Marguerite Okafor-Lindgren

Personal Banker

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BANKING LICENSES

NMLS registered mortgage loan originator (SAFE Act registration)

FINRA SIE exam passed, 2024

SUMMARY

Personal banker with 6 years in retail banking, 4 of them managing a branch client book of about 600 households. Open checking, savings, CD and small business accounts, refer clients to mortgage, lending and investment partners and keep KYC files audit-ready. Ranked in the top 3 of 22 bankers in the region on new deposits in 2025, with a client survey score of 4.8 out of 5.

EXPERIENCE

Personal Banker II — Piedmont Crescent Bank

Charlotte, NC · Apr 2022 – Present

- Opened about 420 new checking and savings accounts a year, reaching 112% of the branch goal in 2024 and 118% in 2025.
- Brought in about $9.4 million in new deposits over 3 years through CD renewals, rollovers and new household relationships.
- Referred about 140 clients a year to mortgage, small business and investment partners, with 38% of referrals closing.
- Kept 0 KYC or account opening exceptions across 4 internal audits by checking ID and beneficial ownership forms on every file.
- Held a client survey score of 4.8 out of 5 across about 300 responses, the highest in a branch team of 7.

Teller and Teller Lead — Rocky River Members Credit Union

Gastonia, NC · Jun 2019 – Mar 2022

- Handled about 140 transactions a day with a cash drawer balanced to the cent on 98% of days.
- Referred about 25 members a month to the member service team for loans and new accounts.
- Trained 4 new tellers on cash handling, holds and fraud checks as teller lead in 2021.

SKILLS

Client Relationships: Needs-based conversations, account reviews, household planning, follow-up calls

Deposit and Lending Products: Checking, savings, CDs, money market, credit cards, personal loans, small business accounts

Compliance: KYC, CIP, BSA/AML red flags, Reg E disputes, beneficial ownership, OFAC checks

Systems: Salesforce Financial Services Cloud, core banking platform, Microsoft Excel

EDUCATION

B.S. Business Administration, University of North Carolina at Charlotte, 2019

Fictional example by FindAJobAI: the person, employers and numbers are invented.