

YOUR RESULTS

Your resume has been audited through the PivotReady 12-point positioning framework — built on real hiring intelligence and designed around one belief: that the real human behind this document deserves accurate, honest positioning.

Sarah, you have built something genuinely impressive over 18 years — a \$340M portfolio, double-digit revenue growth, a loyal client base, and institutional trust that survived a merger. The problem is none of that feels like a person on this page. What reads like a compliance audit is actually the story of a senior financial leader ready for a bigger, different stage — and this resume is not yet making that case.

4
STRONG

5
DEVELOPING

3
NEEDS ATTENTION

01 **Headline & Positioning Strength**

NEEDS ATTENTION

There is no headline — the document opens cold with a name and a summary that buries the lead. For someone targeting FinTech advisory, wealth management consulting, or a mission-driven CFO role, the absence of a positioning statement means every reader has to do the work of figuring out who she is and why she matters.

Add a one-line headline directly under your name — something like 'Senior Commercial Banking Executive | FinTech Advisory | Mission-Driven Financial Leadership' — so the reader knows your destination before they read a single bullet.

02 **Professional Summary Impact**

DEVELOPING

'Results-driven financial services professional' is one of the most overused phrases in professional documents and it signals nothing about Sarah specifically. The summary closes with 'seeking new opportunities to leverage financial expertise in a dynamic organization' — language so generic it could belong to any of the 12 relationship managers she managed.

Rewrite the summary as three sentences: who you are at your best, what you have built, and where you are going — name the transition explicitly so it reads as intentional, not accidental.

03 Career Narrative Clarity

STRONG

The progression from credit analyst to SVP over 18 years is clean, logical, and credible — a reader can follow the arc of ascending responsibility without effort. The portfolio growth numbers anchor each chapter and give the narrative real weight.

Preserve this chronological spine but add a one-sentence context statement at each role transition to connect the chapters into a deliberate story rather than a list of jobs.

04 ATS & Keyword Alignment

DEVELOPING

The resume is strong on traditional banking vocabulary — commercial lending, portfolio management, credit analysis — but it contains almost none of the language that FinTech advisory, wealth management, or CFO roles actually screen for. Terms like digital transformation, financial technology, strategic advisory, capital allocation, organizational financial strategy, and stakeholder governance are entirely absent.

Map the job descriptions of your three target role types and build a second skills vocabulary that bridges your banking foundation to those destinations.

05 Quantified Impact & Accomplishments

STRONG

The \$340M portfolio, 23% revenue growth, 0.8% delinquency rate, and the Colorado Business Bank growth from \$95M to \$180M are all strong, specific, and credible. These numbers do real work and they stand out against the passive language surrounding them.

Now push one level deeper — add the business outcome behind the number, for example '23% revenue growth, generating approximately \$X in new fee income' so the impact lands at the organizational level, not just the portfolio level.

06 Leadership Presence & Language

STRONG

Leading a team of 12, supervising a team of 6, and managing 85 client relationships establishes real leadership scale. The President's Award citations in consecutive years are quietly powerful proof points.

Elevate the leadership language from managerial to executive — replace 'led a team' with language that shows how you built, shaped, or transformed team capability and culture.

07 Transition & Pivot Messaging

NEEDS ATTENTION

The resume offers no signal that Sarah is intentionally moving toward something new — it reads as a banking resume looking for another banking job. Her board work at the Women in Banking Committee and

her MBA in Finance are assets that could be reframed as transition bridges, but they are sitting inert in separate sections.

Write one sentence in your summary that names the pivot directly — for example, 'Now bringing that foundation into FinTech advisory and mission-aligned financial leadership' — because owning the transition makes it a strength, not a gap.

08 Executive Tone & Readability

DEVELOPING

Words like 'participated,' 'assisted,' 'helped,' and 'worked with' appear repeatedly across multiple roles and they drain authority from someone operating at SVP level. A person who managed \$340M does not assist — she decides, builds, and leads.

Do a full word audit and replace every instance of participated, assisted, helped, and worked with with a verb that accurately reflects the level of agency you actually held.

09 Skills Relevance & Positioning

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The skills section lists Microsoft Office alongside nCino and Salesforce — a pairing that inadvertently signals an operational rather than strategic profile. For the roles Sarah is targeting, the skills section needs to reflect financial strategy, advisory capacity, and organizational leadership.

Restructure skills into two tiers: domain expertise (portfolio strategy, credit risk, commercial finance) and emerging adjacencies (FinTech platforms, digital banking strategy, advisory frameworks) that signal your next chapter.

10 Accomplishment Depth

STRONG

The merger integration line is the most underutilized asset on this resume — surviving a restructuring and contributing to integration work at SVP level is a significant leadership credential that is currently buried in a single passive bullet. The President's Award wins are similarly understated.

Expand the merger integration bullet into two lines that describe what you actually led or influenced during integration, because that experience is directly relevant to advisory and consulting roles.

11 Human Authenticity

NEEDS ATTENTION

This is the most important point in this audit, and it deserves full honesty: Sarah is not on this page. A woman who built client trust over 18 years, who led through a merger, who serves on a Women in Banking board and volunteers with United Way — that person has a point of view, a set of values, and a reason she wants to move toward mission-driven work. None of that is visible here. The resume is a transaction log, not a portrait. The affiliation section hints at a person who leads with values and community — but those hints are filed at the bottom like footnotes instead of woven into the identity of the document. Recruiters

and executives hiring for advisory or CFO roles are not just buying a skill set — they are buying judgment, presence, and perspective. Right now this resume asks the reader to trust the numbers without ever introducing the person behind them.

Start the rewrite by answering one question in writing before you touch the document: 'What do I believe about money, organizations, and people that has shaped how I have led?' — then let that answer live in your summary, because that is the person the right opportunity is looking for.

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Overall Market Positioning

DEVELOPING

Sarah has the credentials, the numbers, and the career depth to compete credibly for FinTech advisory, wealth management consulting, or a mission-driven CFO role — but this document positions her as a displaced banker rather than a senior financial executive making a purposeful move. The gap between who she is and how this resume represents her is significant and fixable.

The single highest-leverage rewrite is the first 8 lines — headline, summary, and top bullet — because that is the entire audition for most readers, and right now those lines are losing the room before the real story begins.

PivotReady

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