



MAILING ADDRESS

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Lane Cove North
NSW 2066
Australia

CONTACT INFO

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SKILLS

PROFESSIONAL

- Mortgage/Asset-based Lending
- Unsecured Lending
- Business Development

ACHIEVEMENTS

- Promoted to RM within 2 years
- Exceeded annual lending target by 90% in the first two quarters as RM
- Portfolio growth of 200% during time as RM

GERALD LAM

CAREER OBJECTIVE

As an outgoing and enthusiastic individual, I wish to build on a successful career through working in a competitive and high pressure environment. I wish to apply my technical and interpersonal skills along with intellectual independence to excel and bring accolades to the firm. I am excited to work in a business that forges lasting relationships with clients by catering to their needs. I look forward to furthering my overall skill-set in a dynamic and open working environment to perpetuate the culture of excellence in the company.

EXPERIENCE

HSBC BANK AUSTRALIA

Premier Relationship Manager | 2016 – 2019

- Portfolio growth and servicing high net worth clients with a global exposure
- Identifying and referring clients to Business Banking for onboarding and business loans
- Identifying and referring ultra-high net worth individuals to HSBC Private Banking
- Analyse financial documentation to assess client's cash flow
- Cooperate with different stakeholders to secure clients' financing
- Constructing unique solutions with a holistic approach to meet client needs
- Complying to HSBC's credit guidelines as it changes in accordance to APRA and HSBC Global Standards



EDUCATION

Sydney Grammar School

HSC UAI: 94.75

2003 – 2008

SKILLS

TECHNICAL

- Analyse Pay-slips, BAS and Tax Returns
- Numeracy Skills
- Microsoft Excel VBA

INTERESTS

HOBBIES

- Coding
- History
- Travel

SPORTS

- Snowboarding
- Basketball
- Rock Climbing

EXPERIENCE (CONT.)

PRM (Cont.) | 2016 – 2019

- Conduct annual banking reviews and CDD to build a robust relationship with clients and manage HSBC's business risk appetite
- Coordinating events for clients and colleagues

Personal Banking Executive | 2015 – 2016

- Onboarding new to bank clients whilst adhering to HSBC's Global AML and FCC standards
- Build and maintain professional relationships with clients
- Compliant with HSBC's Enhanced Due Diligence procedures

Customer Service Representative | 2014 – 2015

- Training and leading a team of CSRs to service walk-in customers' enquiries
- Identifying client's financial needs and making quality referrals to colleagues to deliver outcomes
- Provide prompt retail banking service for customers and aiming to resolve complaints at first contact

REFERENCES

Referees available upon request