ZUBAIR IMRAN

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Nationality: British
Marital Status: Married
Languages: English / Urdu / Hindi

PERSONAL PROFILE

Well rounded financial services professional with 9 years experience in banking and wealth advisory in the UAE and UK. In depth knowledge of financial products and services including investments, debt re-structuring and risk management. I specialise in developing and managing long lasting relationships with key clients and stakeholders to win new business.

PROFESSIONAL EXPERIENCE

Fifty One GT – Dubai, UAE — Jan 2015 to Present
Head of Sales – Middle East

- Develop and establish new sources of business for the Middle East Business Unit (UAE, Oman, Qatar, Bahrain, Saudi and Kuwait) - B2B and B2B2C
- Provide risk management solutions for banks and financial institutions
- Prepare financial models to conduct market research and identify suitable companies
- Acquire and maintain a thorough understanding of business trends and competition
- Support, review and follow up quotations, proposals, tenders and renewals of new or existing portfolio
- Review existing contract terms and negotiate new contracts
- Prepare budgets and forecasting
- Implement solutions to improve unprofitable contracts
- Implement solutions to solve problems and conflicts related to payments or accounting
- Conduct training sessions in order to increase revenue
- Excellent negotiation and closing ability
- Single point of contact for clients and stakeholders

ADCB (Abu Dhabi Commercial Bank) – Dubai, UAE — Jan 2013 to Jan 2015
Senior Relationship Manager

- Managed total assets of USD 60MM
- Responsible for increasing assets under management from USD 35MM - USD 60MM
- Actively managed over 100 HNW and business portfolios, each over USD 500K
- Managed portfolio risks and aligned asset allocation strategies for HNW clients
- Managed corporate relationships and HNW clients, comprising of C-Level executives, Directors and Key decision makers at large multinational organisations
- Understand client’s need and net worth by evaluating their assets and liabilities
- Build and maintain strong relationships with clients to encourage repeat business and grow revenue
- Specialise in all banking products (Investments, Insurance, Loans, CASA, FX, Derivatives)
- Advised clients on debt consolidation and restructuring and investment risk
- Expert in face to face negotiation and closing
- Mentor junior members of the team by attending joint meetings and conducting training sessions
- **Awarded Top Performer 2014**

PSB– Dubai, UAE — Feb 2008 to Dec 2012
Senior Investment Advisor / Team Manager

- Managed total assets of USD 40MM
- Increased personal assets under management from USD 10MM - USD 40MM
- Actively managed over 250 HNW portfolios
- Provide in house tailor made financial solutions for clients (Insurance, Investments, Retirement Planning, Trusts, Loans, Mortgages, FX, Derivatives, Funds etc)
- Specialist in advising on investments, debt instruments, insurance, FX, and derivatives and risk management
- Assess assets and liabilities in order to recommend suitable solutions
- Advised clients on debt consolidation and restructuring
- Conduct in-depth market analysis to find the most suitable companies and products to meet the client’s requirements

- Assessed financial strategy options to meet goals gap analysis and identify most appropriate investments to match risk profile
- Analysed various investment options and managed portfolios providing holistic financial advisory and conducted extensive financial planning including tax advisory, legacy planning, real estate solutions, overseas investment advisory
- Develop own client base through referrals, networking and cold calling
- Expert knowledge of financial markets
- Manage a team of 6 Relationship Managers
- Achieve high personal and team targets

Citisolutions Financial (UK) Ltd – London, UK Aug 2005 to Jan 2008
Relationship Manager

- Proactively sell the full benefits of Citisolutions portfolio
- Develop lasting relationships to encourage repeat business
- Build excellent rapport with customers in order to develop business
- Displays a self confident and assertive style which supports a drive to succeed
- Achieve high personal and team targets
- Anticipate problems and suggest workable solutions
- Work in a regulated environment (FSA)

CORE SKILLS

- Client relationship management and business development
- Strong decision-making and negotiation skills
- Sales, marketing and distribution
- Preparing financial models
- Advanced Excel user

EDUCATION

- 2005 - **BA hons degree in Business Studies and Accounting** - Middlesex University, London, UK

PROFESSIONAL QUALIFICATIONS

- 2017 - **CFA Level 1** (Candidate) – CFA Institute
- 2013 - **International Certificate in Wealth Management** – CII
- 2012 - **International Introduction to Securities and Investment** – CISI

References available on request