

PROFESSIONAL SUMMARY

- Dedicated professional with over 10 years of experience in building strategic client relationship through excellent service and marketing initiatives
- Well-equipped with the qualities to work under pressure. Adept at time management, multi-tasking and prioritizing
- Fluent in English and Mandarin

WORK EXPERIENCE

Bank Julius Baer & Co Ltd Hong Kong **June 2016 – Present**
Assistant Relationship Manager (China Market)

- Manage all service and investment related queries, handling them in a timely and competent manner
- Assist in all compliance related management reports to ensure all internal policies and external regulations are adhered; follow-ups with Private Banker and clients are closely tracked
- Contribute to the marketing efforts of the Private Banker by regularly updating the pitch book with relevant market information and products that are suitable for clients' investment needs

Morgan Stanley Personal Wealth Management Hong Kong **May 2015 – May 2016**
Client Service Associate (China Market)

- Providing client support to 2 Private Bankers in executing banking and investment transactions for clients
- Being the main point of contact between and internal departments to follow up all customer service issues and escalate customer complaints to seniors in accordance with established procedures
- Providing timely and concise market update and information flow to both internal parties and clients

Credit Suisse Private Banking Singapore **December 2014 – April 2015**
Assistant Relationship Manager (Malaysia Market)

- Efficiently handle client portfolios by keeping abreast with product knowledge, system capabilities and compliance requirements
- Independently manage trade execution, funding and cash management for clients
- Assist the Private Banker to maintain a system to keep track and manage the various asset classes that were held across her clients

BNP Paribas Wealth Management Singapore **May 2011 – November 2014**
Marketing Assistant (NRI Market)

- Act as the primary point of contact for the Senior Private Banker's selection of clients based in SEA countries mainly such as Indonesia, Thailand and Philippines
- Monitor and effectively manage portfolios consisting of international equities, fixed income, FX contracts, managed funds, structured products and derivatives
- Training and managing the Junior Assistants to make sure a smooth flow of processing

HSBC Singapore
Premier Service Assistant Manager

October 2009 – December 2010

- Provide sales administrative support to the Relationship Managers; to ensure all sales documentation are in order and completed before batching down to Operations
- To coordinate and liaise with Front Office and Back Office to ensure smooth and efficient flow of processing and prompt follow up on any discrepancies
- Follow up on sales-related complaints according to the established procedures and guidelines by liaising with the respective departments

HSBC Singapore
Sales Support Assistant Manager

November 2007 – September 2009

- Provide sales administrative support to the Sales Managers at CTLA (Corporate Trust and Loan Agency); to guarantee a well-organized handling of all matters
- Perform KYC (Know your client) checks for on-boarding Corporate clients in accordance with the bank's policies and guidelines, follow up and resolve documentation issues with customers in order to protect the bank's position
- Coordinate and participate in risk review meetings and risk management with Legal Compliance

Citibank Singapore
Control Officer

July 2007 – October 2007

- Monitor and control the requestors' access to the bank system; ensure compliance with internal guidelines and procedures
- To update static data accurately and ensure adequate internal controls are in place to minimize errors and provide an adequate audit trail

United Overseas Bank Singapore
Personal Banker

August 2006 – May 2007

- Acquire, develop and service long term relationships to an assigned group of clients
- To grow on portfolio and management account profitability through dedicated customer servicing

ACADEMIC QUALIFICATIONS

National University of Singapore

July 2003 – June 2006

- Bachelor of Arts (Major in History)

CACS – Client Advisory Competency Standards

March 2013

- Paper 1 and 2

REFERENCES

Available upon request