Fay Voutsinas

# Financial Service Associate - Imperial Service

Kirkland, QC

[fotinoula2001@yahoo.com](mailto:fotinoula2001@yahoo.com) - (514) 694-6118

WORK EXPERIENCE

# Financial Service Associate - Imperial Service

CIBC - Kirkland, QC - December 2009 to May 2010

# Financial Service Associate - Imperial Service

CIBC - Lachine, QC - September 2008 to December 2009

* Support the FA in establishing and maintaining strong client relationships in order to understand clients' needs and objectives
* Through client discussions, identify opportunities to stimulate alternative channel usage (i.e., Online Banking, Telephone Banking)
* Support the organization in achieving its objectives by developing all key competencies and successful completion ( including associated exams, tests, etc) for all required accreditation for my role as FSA
* Contribute to the achievement and sustainment of a balanced approach to the Cluster risk profile ensuring risk and compliance controls and processes
* Provide total support to FA to ensure client needs are met
* Prepare Gap Analysis' and identify all products and services that can help FA consolidate clients to CIBC
* Build together a financial plan to achieve clients individual goals and needs

# Financial Service Associate - Imperial Service

CIBC - Pointe-Claire, QC - December 2006 to September 2008

* Support the FA in establishing and maintaining strong client relationships in order to understand clients' needs and objectives
* Through client discussions, identify opportunities to stimulate alternative channel usage (i.e., Online Banking, Telephone Banking)
* Support the organization in achieving its objectives by developing all key competencies and successful completion ( including associated exams, tests, etc) for all required accreditation for my role as FSA
* Contribute to the achievement and sustainment of a balanced approach to the Cluster risk profile ensuring risk and compliance controls and processes
* Provide total support to FA to ensure client needs are met
* Prepare Gap Analysis' and identify all products and services that can help FA consolidate clients to CIBC
* Build together a financial plan to achieve their individual goals and needs CIBC

3343 P Boul. Des Sources, Dollard des Ormeaux, Quebec

# Financial Service Specialist

Imperial Service - May 1996 to December 2006

* Financial Analysis, Investment & Retirement Planning of clients' portfolios
* Build together a financial plan to achieve their individual goals and needs
* Provide clients with objective advise to meet their financial needs, loans & Mtgs
* Established and maintained high quality relationships with clients
* Retirement planning, investment planning and referrals to CIBC Trust for wills and estate planning
* Build together a financial plan to achieve their individual goals and needs
* Maintain existing business & develop new business through referrals and acquiring new potential clients
* Achieve Revenue Objectives, Net Sales, Managed Money, PPS and proactive calls
* Maintain constant awareness of markets, competitors and keep abreast of current events
* Grow business profitability through management of portfolio mix, pricing & diligent expense management
* Capitalize on all business opportunities, use all financial advisory tools (Horizon)
* Ensure compliance with all bank policies & procedures, ensure advise agreement ( Investment Planning/ Horizon) are all signed

# Senior Customer Service Officer - Assistant Manager

National Bank of Greece (Canada) - Montréal, QC - October 1994 to April 1996

* Participated on senior leadership team that opened new downtown branch
* Opened foreign exchange Cambio
* Established and maintained high quality relationships with clients and their needs
* Cross-selling of all financial services

# Senior Financial Consultant

Royal Trust Company - Dorval, QC - November 1992 to September 1994

# Financial Consultant

Royal Trust Company - Dorval, QC - October 1990 to September 1994

* Established and maintained high quality relationships with clients
* Reviewed and analysed clients' financial portfolios
* Sold all financial products and services (GIC's, RRSP's, Mutual Funds, RRIF's, annuities, consumer loans and mortgages)
* Supervised and trained staff to ensure delivery of highest quality services
* Monitored adherence to all control, audit, and lock-up procedures

# Customer Service Representative

Serviced - December 1989 to October 1990

customer requirements

* Balanced daily cash and general ledgers
* Cleared cheques and bank deposits

# Assistant Day Manager

Auberge Belvedere Inn - Montréal, QC - October 1987 to June 1989

* Employed part-time while completing university studies and then full-time
* Accounts payable and receivable
* Front and back office operations
* Supervised office clerks and admin. support staff

EDUCATION

# Personal Financial Planning Course

The Canadian Securities Institute June 1998 to May 2003

Trust Companies Institute April 1994

McGill University - Montréal, QC September 1990

**Bachelor of Arts in Economics** John Abbott College - Bellevue, QC May 1989

# Academic and Professional Education

The Institute of Canadian Bankers