

Mobile Number: +61 497 346 930

Date of Birth: 25/11/1994

Residency Status: Permanent Resident

E-mail: devarasen@gmail.com

“Experienced operations and client services officer looking for a more involved role in the finance industry”

Work Experience

St, George Bank – Loan Processing Officer (March 2021 – Present)

Sydney, Australia

My role was based in the Auto Loan division, and I was a team member in the Proof of Income team.

The role consisted of:

- Assessing applicants income streams such as regular income, rental income, child support income, family tax benefit etc.
- Providing calculation notes and income verifications on applications.
- Worked closely with credit team and settlements team to assist with proof of income queries.

BT Financial Group – Customer Relations Consultant (Feb 2019 – August 2020)

Sydney, Australia

My role was based around investment platforms such as Panorama and Asgard. These platforms were used as superannuation/trust/personal accounts. My role consisted of:

- Having a high-level understanding of our investments platforms to assist with navigation queries.
- Assisted with enquiries regarding superannuation, financial markets, and the various asset classes (managed funds, listed securities, term deposits) provided on the platform.
- Generating performance reports of assets and handled trade enquiries.
- Providing accurate information about our products and processes.
- Providing exceptional customer service for all internal and external customers whilst adhering to internal compliance rules.
- Identifying opportunities for other WBC group products and refer to the relevant area.

Vantage FX Pty Ltd – Operations and Client Services (Feb 2018 – Jan 2019)

Sydney, Australia

- Completed due diligence on clients' applications as required by our AML and CTF compliance regulation.
- Administered general operation duties on clients' portfolios.
- Provided general advice about the MT4 trading platform and the financial products that are traded on the platform.
- Resolved issues pertaining to client's trades and their platform.
- Supervising and delegating duties to a team of 3 people.

BioScout Pty Ltd – Financial and Accounting Consultant (July 2017 – Jan 2018)

Sydney, Australia

- Key member in the early stages at a deep-tech firm which was started in the University of Sydney.
 - Prepared the business plan to seek funding.
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- Generated the financial statements for the business.
- Generated market analysis by meeting potential clients to gauge the target market and performed in-depth research to identify opportunities and risks for the business.
- Built financial models to perform future profit and loss projections of the company using data from the market analysis.
- Assisted with the company's "NSW Minimum Viable Product Grant application", according to NSW government guidelines.

AIA Shared Services Sdn Bhd – Investment Accounting Intern (Jan 2017 – Apr 2017)
Cyberjaya, Malaysia

- Performed reconciliation task between the company's SAP database and brokerage statement.
- Liaised with the information systems department to ensure statements were reported for clients on a timely basis.

Education

CFA Institute *June 2017 - Ongoing*

CFA Status: Passed Level 1

RG146 *Feb 2018 – Aug 2018*

Courses: Tier 1 Compliance Solutions - General Knowledge, Foreign Exchange
Tier 1 Derivatives – General Advice

University of Sydney - Class of 2016 *Completed Dec 2016*

Bachelor of Commerce (Double Major) – Major in Accounting and Finance
Sydney, Australia

Relevant coursework: Corporate Finance, Investments and Portfolio Management, Bank
Financial management, Trading and Dealing in Securities Market, Basic Economics,
Financial Accounting, Management Accounting, Contract Law

Taylor's College Subang Jaya – Class of 2012 *Completed Dec 2012*

South Australian Matriculation

Subang Jaya, Malaysia

Skills

Programs/Applications

- Microsoft Office (Word, Excel/VBA, Outlook, PowerPoint)
- Bloomberg Terminal
- SAP
- Panorama, Asgard

Languages

- Fluent in English, Malay, Tamil, and Indonesian

References

Can be provided alongside additional information if required
