Gary Ho

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EDUCATION University of Technology Sydney, Ultimo, NSW, Australia 2017

Bachelor of Business

Bachelor of Science in Information Technology

Newington College, Stanmore, NSW, Australia 2010

Professional Experience Allianz Retire+, Sydney, NSW, Australia

Operations Analyst

Lead the delivery and test execution of a major calculation and systems ungrade leading to

- Lead the delivery and test execution of a major sales campaign and systems upgrade leading to \$13M+ in sales to date
- Planned and delivered the client services model for the administration team and contact center
- Delivered high-quality and timely client service and administration within SLAs to positive feedback from clients and financial advisers
- Collaborated on the design and development of new Retirement Income Opportunity (Project RIO) working alongside all organisational departments for MVP product launch
- Designed and built automated reporting tools for internal and external stakeholders
- Scheduled and ad-hoc support to sales teams providing reporting, tracking, and troubleshooting

Perpetual Limited, Sydney, NSW, Australia

Client Services Consultant & Resolutions Team Member

May 2016 - August 2018

- Responsible for handling in-depth queries relating to products, superannuation, and managed funds received by phone and email for both clients and financial advisers with industry leading rankings and a personal Net Promoter Score (NPS) of greater than 8
- Provided accurate and prompt information regarding products, performances, and processes whilst remaining up to date with legislative and regulatory changes
- Engaged in various side programs including process improvement, lost super, and employee training Internal Complaint Resolution & Adviser Maintenance Team
- Initiated and executed in-depth investigations of formal complaints whilst acting as the primary point of contact for complainants
- Drafted key responses and recommended resolutions to complaint cases
- Sole stakeholder manager for external advisers and licensees for all remuneration matters
- High- and low-level auditing of commission statements for off-shore teams to review and amend
- Provided regular reporting and analysis for internal & external parties

$Selected\ Projects$

- Developed and maintained new and existing management reporting tools in Excel & Visual Basic
- Identified and spear-headed online portal password reset function improvement
- Key participant in the requirements and User Acceptance Team of new Salesforce CRM implementation

Third Rock Cafe / Dumbleton, Beverly Hills, NSW, Australia

Day Manager January – October 2015

Trangs Food, Revesby, NSW, Australia

<u>Sales Assistant</u> February 2013 – November 2014

SKILLS AND CERTIFICATES Fluent with Microsoft Office, i.e. Word, Excel, PowerPoint

Experience with Salesforce CRM

Familiar with programming languages Java, Python, HTML & VBA

Regulatory Guide 146 (RG146) Compliant

LEAN Bronze trained and certified

Non-profit & Movember $\frac{2016-2018}{\text{Miscellanous}}$ J.P. Morgan Corporate Challenge $\frac{2016-2018}{2016-2017}$

Worlds Greatest Shave 2010 – 2015

TIME Magazine's Person of the Year 2006