

Gabriel Wong

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Career Objective

To gain technology experience as a DevOps/Infrastructure Engineer. This will allow for progress in terms of expertise, support, development and innovation through exposure to new ideas for personal and professional growth, as well as growth for the company.

Academic Background

05.2020 – Present	Coder Academy - Code, Cloud & Cyber Security Bootcamp / Diploma of IT
02.2019 – 12.2020	Monarch Institute - Advanced Diploma of Financial Planning
09.2015 – 07.2016	Monarch Institute - Diploma of Financial Planning (RG146)
03.2010 – 06.2013	Monash University - Bachelor of Commerce (Accounting and Finance)
09.2012 – 01.2013	Utrecht University (The Netherlands) – Semester Exchange Program
01.2004 – 11.2009	Glen Waverley Secondary College - Victorian Certificate of Education

Employable Skills

Teamwork Skills

- Collaborating with advisers to ensure their advice is compliant and meets CBI. (Fiducian)
- Liaising with other departments regarding the escalation of issues and participating in the resolution and response back to the customer/adviser. (PLUM)
- Referring pension and insurance opportunities to MLC Phone Based advisers.

Administrative & Organisational Skills

- Writing urgent SOAs for advisers in a timely manner. Ensuring high quality SOA standards are still achieved. (Fiducian)
- Preparing our Contact Centre's daily team statistics. Ensuring accurate data is provided whilst taking member calls. Emailing them to everyone to drive performance. (Plum)

Technical Skills

- Providing technical knowledge to clients eg. conditions of release, contribution caps, defined benefits, plan specific information. (PLUM, Fiducian)
- Delivering 100% accurate information to members/clients and advisers.

Written and Verbal Communication Skills

- Building rapport with customers, identifying their unique needs/pain points, communicating our value proposition, building trust and referring them onto the Lending Manager or Customer Service Specialist. (Bank of Melb.)
- Assisting our online members/advisers with their enquiries through written communication via Livechat (through the Plum website).
- Resolving Customer Complaints using the LEAP Model – Listening, Empathizing, Acknowledging and Proposing solutions to our clients/members. (PLUM)

Time Management Skills

- Achieving individual productivity KPIs (adherence to schedule, number of repeat calls, gateway leads, average handle time) to maximise our contact centre's Grade of Service. (PLUM)
- Creating a daily to do list and crossing off items once completed.

Problem Solving & Analytical Skills

- Resolving clients/advisers' concerns in the most efficient way possible. Achieved through effective questioning and utilising all available information systems/resources. (PLUM)

Career Experience

Shadforth Financial Group

07.2019 – Present

Associate Adviser

- Point of contact for client technical queries.
- Preparation for client meetings including cashflow modelling, calculations and research.
- Assisting the Private Client Advisers with strategy development.
- Lodgement of advice requests with Paraplanning team.
- Preparation of Records of Advice.

Fiducian Financial Services

02.2017 – 07.2019

Paraplanner (Authorised Representative Number 1270209)

- Preparing high quality comprehensive Statement of Advice documents for Fiducian's network of Financial Planners.
- Developing investment strategies and generating financial models to represent the investment strategies. Performing calculations.
- Liaising with Financial Planners/Technical Service Manager/Paraplanners to produce compliant advice documents.

Plum Super (NAB Wealth)

01.2016 – 02.2017

Member Services Consultant - Wealth Direct Service

- First point of contact for advisers and members in the Plum Contact Centre. Providing general support across PLUM's range of investment, insurance and superannuation products.
- Providing empathetic customer service through respect, understanding and effective communication.
- Providing prompt escalation of issues and participate in the resolution and response back to the customer/adviser.
- Taking responsibility for delivering 100% accurate information to customers and advisers.
- Meeting individual productivity and quality standards as determined by the business.

Bank of Melbourne

11.2013 – 01.2015

Customer Service Officer

- Providing daily banking services to customers, such as transactions, enquiries and problem solving.
- While serving, identifying potential sales opportunities through conversations and observations; referring potential leads to Customer Service Specialists and Lending Manager.
- Responsible for branch daily operations, such as security testing, ATM balancing, cash level management, ensuring posters and flyers are up to date, etc.

Sunglass Hut

7.2013 – 11.2013

Sales Assistant

- Facilitating the sale of luxury and designer sunglasses with customers.
- Handling cashiering duties entrusted by the store manager.
- Acquiring sales techniques and gaining insight on the fashion eyewear and retail industry.
- Experiencing diverse customer types and developing strong consumer understanding.

Cygnnet Pool Supplies

12.2009 – 06.2012

Customer Service Specialist

- Providing excellent customer service by identifying customer needs, instructing customers on what products to use on a case-by-case basis and assisting with pool enquiries.
- Water testing, advising clients on how to maintain pool systems and the proper way to use pool products to maintain swimming pools.

Accomplishments

National Finalist - Business Icon Competition 2012

23-25.07.2012

- National young leaders' business competition that brings together top business leaders and young people aged 18-25 to bridge the gap between education and employment.

Extracurricular Activities

Peers, Ambassadors & Leaders Program – Monash University

01.2012 – 08.2012

Leaders Program

- A leadership program that developed a deeper understanding of one's self and society.
- Participating in the Cranlana Colloquium, a leadership forum where participants reflected on the nature of leadership and the values that determine our actions.

References

Available Upon Request