

TAI HO

Taiho051493@yahoo.com | 909-919-3053

Summary

I am a highly motivated and personable individual with a strong career focus and a competitive spirit. Proficient in Information Technology, I am dedicated to customer satisfaction and adept at surpassing sales targets with unwavering integrity. My objective is to leverage my expertise to assist others in enhancing their financial well-being and understanding, utilizing both my interpersonal skills and IT proficiency.

Skills

- Bilingual (Viet)
- HTML & CSS
- OOP / jQuery / API
- Discover needs
- Financial Services
- Receptionist Skills
- JavaScript
- GitHub / IntelliJ / Bitbucket
- Node.JS / Bootstrap
- Wealth Planning
- Data structure & Algorithms
- Risk Management

Experience

Relationship Banker | Chase Bank - McKinney, TX | 04/2023 - CURRENT

- Successfully managed a portfolio of clients, building and maintaining relationships to drive revenue growth.
- Achieved or exceeded sales goals consistently by cross-selling products and services, resulting in increased customer satisfaction and loyalty.
- Conducted in-depth financial needs assessments for clients, identifying opportunities to provide tailored financial solutions.
- Proactively contacted clients to offer financial advice, provide updates on account activity, and address any inquiries or concerns.
- Utilized comprehensive knowledge of banking products and services, including checking and savings accounts, credit cards, loans, and investment options, to educate clients and recommend appropriate financial solutions.
- Demonstrated expertise in financial planning, retirement planning, and wealth management to assist clients in achieving their financial goals.

Concierge Banker | Citibank - Upland, CA | 02/2020 - 08/2022

- Helped customers open and close checking accounts, credit cards, savings accounts, personal loans, wires, and refer mortgages and investment opportunities. Assisted clients with various questions and concerns related to their accounts, bank products, and introducing online/mobile banking.
- Processed daily client transactions, including deposits, withdrawals, money transfers, loan payments, and selling cashier's checks.
- Accurately maintained records of each transaction and ensured all documentation and paperwork was in place and within compliance (daily audit of the branch).
- ACHIEVEMENTS: gain supervisor authorities within 6 months then got promoted to concierge banker in a year because I was top sales in the IE area for 4 months straight as a teller.

Head Cashier | Home Depot - Ontario, CA | 04/2019 - 08/2020

- Awarded employee of the month for 3 months straight and becoming top credit card sales associate in the area averaging 4 credit card applications each day.
- Answering the telephone; taking and relaying messages; providing information to callers
- Successfully assisted customers with product selections and purchases, e-service transactions, and
- Achieved daily sales goal by cross selling and promoting additional products and services, and
- Built rapport with customers by asking probing questions and utilizing effective listening skills

Certification

SIE

Finra: Series 6

Finra: Series 63

life insurance

Completed a few UDEMY courses