

# STAN CHAO

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## Summary

Nine years of successful sales and customer service experience in the financial services industry. In addition to my customer facing experience, I have a strong background in mathematics and finance through post-secondary and self-directed studies.

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## Skills

- ❖ Critical Thinking
  - ❖ Communication
  - ❖ Research
  - ❖ Team leadership
  - ❖ Client relations
  - ❖ Creativity
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## Work Experience

**Personal Banker** | *Bank of Montreal* 12/2015-present

- ❖ Consistently ranked among the top 15% of investment advisors in my market
- ❖ Q3 2020, Q3 2019 and Q1 2017 internal Spotlight Award winner
- ❖ Experience with every area of retail banking, including lending and financial planning
- ❖ Excelled in cultivating relationships with clients to drive business growth
- ❖ Helped to train new personal bankers

**Customer Service Representative** | *Bank of Montreal* 04/2012-12/2015

- ❖ Consistently exceeded sales and customer service targets
- ❖ Excelled in resolving customer issues and complaints

**Energy Consultant** | *Superior Energy* 05/2009-09/2011

- ❖ Experience with cold calling and door-to-door sales
  - ❖ Full commission-based compensation
  - ❖ Trained new sales representatives
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## Education and Training

**Combined Major in Economics and Statistics** | *University of British Columbia* 2013

**Software Engineering Immersive** | *General Assembly* 2021

**Complete Python Bootcamp Certificate** | *Udemy.com* 2021

**Chartered Financial Analyst Level 1** | *CFA Institute* 2018

**Canadian Securities Course** | *Canadian Securities Institute* 2016