

STAN CHAO

(604) 700-5765 | Vancouver, BC
cardioforcake.dev@gmail.com
<https://stanchao.netlify.app/>

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.

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

Complete Python Bootcamp Certificate | *Udemy.com* 2021

Chartered Financial Analyst Level 1 | *CFA Institute* 2018

Canadian Securities Course | *Canadian Securities Institute* 2016