Jingshu (Nora) Sun

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Career Profile

Objective focused paraplanner with over four years' experience. Looking to transition into an organisation that provides new challenges and opportunities for development. Robust foundations in financial modelling, strategic analysis and report writing. Strong desire to continue learning from an experienced team and further develop my skillset. Ideally positioned to meet, exceed goals and contribute to the company's long-term success.

Relevant Experience

July 2020 – Current: MLC Wealth (Remediation Analyst)

- Manage and complete workload of inbound processing requests relating to remediation in a timely manner. This includes making and receiving calls to clients or beneficiaries of late clients to complete the work
- Identify client needs through appropriate questioning techniques, research every issue and provide solutions and escalate unresolved problems
- Follow the prescribed call approach and structured framework when contacting clients or third parties
- Accurately record discussions and interactions with clients in workflow management systems
- Build sustainable relationships and engage clients by taking the extra mile
- Proactively and positively work with the team and other business units to achieve business outcomes, through effective relationship building

May 2019 – May 2020: National Australia Bank (Paraplanner)

- Prepare comprehensive Statement of Advice documents via XPLAN
- Ensure advice is legally compliant & accurate
- Liaising with planners to analyse, develop, & improve strategies
- Conduct advanced financial modelling through the use of Xtools & Xtools+
- Experience with financial advice regarding superannuation, social security, managed investments, & retirement planning

April 2018 – April 2019: ESSSuper (Paraplanner)

- Prepare comprehensive Statement of Advice documents via XPLAN
- Experience with financial advice regarding superannuation, defined benefits, social security, managed investments, & retirement planning
- Training staff members on internal processes & products, including 5 unique defined benefit funds
- Ensure advice is legally compliant & accurate
- Liaising with planners to analyse, develop, & improve strategies
- Conduct advanced financial modelling through the use of Xtools & Xtools+
- Assisting in hiring of staff
- Peer reviewing plans
- Updating existing, & creating new Statement of Advice templates

March 2016 – April 2018: Guideway Financial Services (Paraplanner)

- Prepare comprehensive Statement of Advice documents via XPLAN
- Conduct advanced financial modelling
- Experience with financial advice regarding superannuation, insurance, managed investments, government defined benefit & retirement planning
- Training staff members on technical knowledge, strategy development and report writing skills.
- Ensure advice is legally compliant & accurate
- Worked with a range of superannuation funds including retail, high net worth, industry, & government
- Liaising with planners to analyse, develop, & improve strategies
- Assisting with the training of new staff
- Peer reviewing plans

Education

Current: Continuing Professional Development

2017: Diploma of Financial Planning (RG146)

- Units include financial planning, insurance, superannuation & managed investments

2012-2015: University of Melbourne

- Bachelor of Commerce (Major in Actuarial studies and Finance)

2006- 2011: Frankston High school (ATAR Score: 96.60)

- Victorian Certificate of Education
- Subjects completed: English, Mathematical Methods, Specialist Mathematics, Further Mathematics, Chemistry, Chinese

Skills and Abilities

- Advanced skills in financial modelling
- Solid understanding of XPLAN for financial planning purposes
- Advanced knowledge of Microsoft Office Suite
- Ability to work in teams and autonomously
- Very capable at building and maintaining a good rapport with people
- Strong work ethic
- Fluent in both English and Mandarin (including reading, writing and speaking)

Interests and Hobbies

- Programming – Currently learning Python in my spare time
- Movies

References

- Available upon request