**NIANCHI WU**

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**Summary of Qualifications**

* CFA Level II candidate (passed Level I on first attempt). Completed IFIC course
* Practical experience of Direct Investing; Constructed diversified portfolios with instruments including ETFs and stocks to achieve different investment goals
* Master of bank’s tools, financial instruments and investment strategies
* Professional presentation and interpersonal skills. Proven written and verbal communication skills
* Proficient in Office Suite including Excel, Word, Outlook. Aptitude to quickly acquire new knowledge and skills.
* Positive and enthusiastic attitude; Ability to produce work efficiently and accurately
* Fluent in Mandarin for business communications

**Employment Experience**

**Banking Advisor Nov. 2018 – Present**

RBC Royal Bank, Mississauga

* Play a key role in advising clients of high-level financial solutions from a range of available investment including mutual funds and fixed income solutions. Rated as outperformance in the last quarter
* Create KYC for clients based on investment goals, time frame and risk tolerance and provide appropriate portfolios correspondingly
* Address clients’ concerns on investment strategies, fees and market volatilities
* Cultivate and maintain relationships with business partners to create more opportunities and referrals while maintaining confidentiality and accuracy
* By asking thoughtful probing questions, engage with clients and create positive experiences to retain and deepen relationships
* Educate clients on how to utilize self-service including online banking and mobile banking. Direct client to different investment channels including RBC InvestEase, RBC Direct Investing and Estate upon necessity

**Customer Service Representative Apr. 2018 – Nov. 2018**

Bank of Montreal, Mississauga

* Independently sought a partnership with Humber College to open accounts for newly arriving international students and built up a long-term relationship with them
* Solved clients’ immediate banking needs including transactions and profile maintenance. Achieved an overall sales target of 125%
* Offered advices and guidance on the digital and self-serve options available; Initiated referrals to the appropriate team member to ensure that BMO is able to address all of the clients’ needs.
* Stayed on top of the market and trending topics to properly address client concerns or educate clients as needed

**Journalist, editor, Reporter Jul. 2014 – Jul. 2016**

Bishan TV Station, Chongqing, China

* Managed Interviews, wrote and edited 5 pieces per week; edited footage to create videos for multimedia platforms
* Served as head reporter, delivered live reports from site of events
* Leadership of directing a team of cameramen and editors to complete television projects
* Monitored and operated daily process of digital media including content management, click rate, feedback analysis

**Education**

**Global Business Management, Post Graduate Certificate Program Jan. 2017 – Aug. 2018**

Humber College, Toronto, ON

Relative Coursework: Managerial Accounting and Finance, Statistics, Management Economics, Project Management, Marketing, Business Research, Customer Relationship Management

**Global Journalism and Communication, Honours Bachelor of Arts Sept. 2010 – Jun. 2014**

Southwest University of Political Science and Law, China

Coursework: Digital Media Affairs, Interpersonal Communication, Organizational Communication, Communication Psychology, Public Relations, Advertising, Public Opinion, Brand Marketing and Communication, Market Investigation and Statistical Analysis