

Financial Analyst / Manager

CHARMAINE ANN S. PADRE JUAN

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## SUMMARY

Experienced **financial advisor** with seven years of dedicated service in the insurance industry. Proven expertise in **financial** planning, sales and client relationship management. Seeking opportunities to contribute diverse skills and strategic insights in a dynamic professional environment. PROFESSIONAL EXPERIENCE

TD Insurance Agency Inc. (Client Advice Centre) February 2024 - Present Saint John, New Brunswick

### Contact Centre Representative

Advising clients of their options for needed products and services and helping them make well-informed decisions.

Filing the necessary endorsement and monitoring client claims. Responsible for calculating premiums, negotiating with clients, and introducing clients to new products.

Navigating computer software programs for online processing of all policy requests, interviewing clients and ensuring that necessary forms and information are filled out and filed. Tim Hortons November 2023-January

2024

Saint John, New Brunswick

### Food Service Supervisor

Oversaw the smooth operation of the restaurant during assigned shifts, ensuring excellent customer service and high-quality food.

Trained, coached, and motivated team members, providing guidance and support to ensure adherence to standards and procedures.

Monitored inventory levels and assisted with placing orders to ensure product availability.

Handled customer inquiries and complaints and resolved issues promptly and professionally.

Assisted with cash management, including reconciling cash drawers, preparing deposits, and ensuring accuracy.

Collaborated with the management team to drive sales, improve operational efficiency, and achieve business objectives.

BDO Life Assurance Company, Inc. November 2016- August 2023

Cabanatuan, Philippines

### Premier **Financial Advisor**

Assessed clients' **financial** situations, developed personalized **financial** plans, and guided them in making profitable and secured decisions.

Done network, generated leads and sold mutual funds, stocks, bonds, etc., to meet sales.

Assisted clients in claims and did administrative work to ensure completeness and accuracy of necessary forms to fill and file.

Built strong connections with partners, clients and prospects by utilizing cold calling, email, and regular client check-ins.

Delivered informative product presentations to partners, employing a personalized approach to address each client's specific insurance requirements and preferences.

### EDUCATIONAL BACKGROUND

Bachelor of Science in Civil Engineering, Nueva Ecija University in Science and Technology  
General Tinio Street, Cabanatuan City Nueva Ecija, Philippines, 2016

forecasting

Documentation Skill

Ability to conduct interviews

Good judgment and decision-making skills

Comfortable with technology and various types of databases and software

Attention to details

Analytical Skill

Cross-Cultural Communication

Budget control