

## Jed Mark L. Del Castillo

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### EDUCATION

**Ateneo de Manila University**, Quezon City, Manila, Philippines

Bachelor's Degree in Economics, March 2008

QPI: 3.2 out of 4.0 (B/B+ equivalent)

Dean's Lister

Top 20% of the graduating class

Granted Scholarship for the Whole Stay

### PROFESSIONAL EXPERIENCE

**Licensed Financial Advisor/ Certified Investment Solicitor**, Sun Life of Canada (Philippines) (July 2009- Present)

- Licensed Financial Advisor and Certified Investments Solicitor with 9 years of experience in sales and marketing in the financial services industry, particularly in the field of life insurance and mutual fund investments for Sun Life of Canada.
- Improved the financial health of hundreds of clients by analyzing their financial needs especially on retirement, wealth accumulation, education planning and insurance; consequently, leading them to avail of the various financial services and products of the company.
- Conducted several financial planning seminars and marketing campaigns to both corporate and small groups to increase financial literacy. These sessions would ultimately lead clients to be interested in purchasing wealth and insurance products.
- Established and designed employee retirement plans for corporate accounts that are compliant to the Philippine government's Retirement Pay Program.
- Assisted in the processing of both living and death benefits of clients.
- Maintained long-term relationships with clients.
- Awarded several times for having delivered good quality business to the company as measured by the number of clients that are contributing to their insurance and investment contracts versus lapsed businesses.
- Recognized several times as one of the top producing advisors in the company for several years.
- Joined the Registered Financial Planners of the Philippines (RFP) organization by undergoing extensive training on personal financial management; awarded the title RFP member graduate after fulfilling course requirements.
- Shared expert views on personal financial planning on the largest TV network (ABS CBN) in the country for several occasions.
- Taught fellow advisors sales techniques and presentations; also helped them understand and interpret financial market conditions and updates on a regular basis.

**Risk Management Analyst**, Chinabank Corporation (February 2009- May 2009)

- Analyzed loan agreements of different clients of the bank, evaluated loan concentrations and risk, monitored movements in the loan agreements that are considered large exposures, monitored possible loan exposure limits and breaches, made monthly loan portfolio reports, reviewed deficiencies in credit lending procedures.