CRYSTAL SIM

BANKING SALES OFFICER

Email: crystal.sim@email.com   |   Mobile:+65 12 XXXX XXXX   |   Nationality: Singaporean

EXECUTIVE SUMMARY

* Professional banking sales officer well-versed in client satisfaction and management with 4 years of experience in the retail-banking sector
* Proven expertise in tailoring customised financial services and products (e.g. insurance, mutual funds, foreign exchange, fixed income instruments, and credit facilities) to meet client needs and preferences
* Highly proficient at building and maintaining strong relationships with clients and across all organizational levels

KEY SKILLS

Banking Sales & Strategy   |   Client Management   |   Financial Products   |   Negotiation   |   Client Acquisition   |   Leadership & Communication

PROFESSIONAL EXPERIENCE

SENIOR PERSONAL BANKER (WEALTH ADVISORY & RETAIL)

Jun 2015 – Present

CIMB BANK, Singapore

* Provide clients with high quality customised financial services and products (such as bank assurance, mutual funds, bonds & FX), and engage clients on legacy planning and solutions
* Actively source for new clients to enhance bank’s existing portfolio, and build strong relationships with existing clients while enhancing their current assets
* Constantly keep updated on latest financial market trends, new product launches, and finance-related news

Significant Highlights

* Met sales target month on month. Played pivotal role in achieving annual sales target of 160% for financial year 2016.
* Achieved Top Banker (Insurance – Regular Premium) in 2016 as a result of driven and results-oriented mindset and ability to understand and meet customer needs

RESUMEWRITER   |   ASIA

FINANCIAL SALES ASSOCIATE

Jul 2013 – Jun 2015

MAYBANK, Singapore

* Constantly liaised with new and existing clients to understand and meet their financial service and product needs
* Promoted retail banking products and increased clients’ product awareness

Significant Highlights

* Exceeded sales targets set by retail banking team via efforts in client acquisition, accounting for 1/5 of team’s new client portfolio for 2014

EDUCATIONAL & PROFESSIONAL QUALIFICATIONS

* Bachelor of Business Administration (Finance Major), University of Singapore, 2005-2008
* Professional Certification/Exams: M1B, M5, M9, HI, WMI (Affluent- Level 1)

MISC. INFORMATION

* Technical Skills: MS Office Suite
* Languages: Fluent in English, Bahasa Melayu, Mandarin, and Cantonese. Knowledgable in Basic Japanese
* Availability: Immediately

*References available upon request*