

# WAN ADAM ZUHAIR BIN WAN MUHAMMAD FAHMI

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| Location: 303 Woodlands Street 31 #03-179, Singapore 730303

## PROFESSIONAL SUMMARY

Banking professional with 3 years' experience in front-line relationship management, KYC compliance, and client onboarding. Skilled in financial analysis, customer service, and cross-border client support, with proven ability to meet regulatory requirements and deliver high client satisfaction.

## PROFESSIONAL EXPERIENCE

### Senior Personal Financial Consultant

*OCBC Bank, Singapore | Aug 2024 – Mar 2025*

- Oversaw daily branch operations to ensure smooth workflow and compliance, contributing to improved operational efficiency and revenue growth.
- Conducted KYC/CDD reviews in compliance with MAS regulations, ensuring zero audit findings.
- Delivered client-centric solutions, enhancing customer retention and satisfaction rates.
- Liaised with compliance teams to escalate and resolve complex KYC/SOW cases

### Relationship Manager

*UOB Bank, Singapore | May 2023 – May 2024*

- Managed a portfolio of 200+ high net-worth clients, generating fee income through investments, FX, and insurance products.
- Ensured accurate documentation and adherence to compliance policies during account opening.
- Built and maintained strong client relationships, resulting in repeat business and referrals.
- Reviewed KYC documents and performed periodic client due diligence checks to meet regulatory requirements.
- Assisted in assessing SOW documentation for wealth clients, supporting compliance with MAS AML/CFT guidelines.

### Primary Banker

*HSBC Amanah Bank, Malaysia | Oct 2021 – May 2023*

- Delivered tailored financial solutions for SME and retail clients, improving cross-sell ratios.
- Supported clients with onboarding, loan processing, and compliance documentation.
- Achieved consistent sales targets while maintaining high service quality.
- Handled SOW reviews for clients, ensuring accuracy and completeness of financial background verification.

## CORE SKILLS

- KYC & CDD Processes
- Client Relationship Management
- Regulatory Compliance (MAS)
- Microsoft Office & CRM Systems
- Financial Analysis
- Data Analysis
- Problem Solving & Communication Skills

## PROFESSIONAL DEVELOPMENT

### IBM Data Science

**Professional Certificate** (in progress, Coursera) – covering Python, SQL, data visualization, and applied data analysis.

### Google Data Analytics

**Professional Certificate** (in progress, Coursera) – focused on data cleaning, analysis, and visualization using SQL, Excel, and Tableau.

## LANGUAGE

English – Proficient

Malay – Proficient

**Account & Admin Intern**

*ARTEZ Group, Malaysia | Jan 2019 – Mar 2019*

- Assisted in accounts payable and accounts receivable processes.
- Provided admin support to various departments.

**Marketing Intern**

*Cinema Online, Malaysia | Aug 2016 – Nov 2016*

- Assisted in developing marketing strategies and campaigns.
- Supported the creation of marketing materials for digital content.

**EDUCATION & CERTIFICATIONS**

**Taylor's University, Malaysia | Mar 2017 - Oct 2019**

Bachelor of Business (Hons) in Finance & Economics

**Institute of Banking & Finance (IBF), Singapore**

- Rules & Regulations for Dealing in Securities, M1B

**Singapore College of Insurance (SCI), Singapore**

- Health Insurance, HI
- Life Insurance and Investment-Linked Policies I, M9
- Rules & Regulations for Financial Advisory Services, M5

**EXTRA CURRICULAR**

**Ernst & Young – Young Tax Professional of The Year Competition, 2019**

Participated in the intervarsity annual case study competition.

**Inter-varsity Stock Challenge, 2019**

Participated in a 3-month long interactive stock-trading simulation competition.

**PAWS For Life, 2019**

Participated in a fundraising for animal shelter.

**Fugee Program, 2016**

Conducting business education classes for refugees