

CLIENT NAME

City, State, Country | Phone | Email | LinkedIn Profile

Financial Analyst

Education & Professional Development

Academic

- B.Sc. with double major in Economics & Finance, University of the West Indies, 2015-2018
Relevant courses: Financial Management 1 & 2 | Intro to Cost & Managerial Accounting | Financial Accounting | Risk & Treasury Management | Economics of Financial Institutes | International Finance Business Strategy & Policy | Project Management | Quantitative Methods | Computer Applications
- High School Diploma, William Knibb Memorial High, 2010 -2015
8 CSEC – 6 at Grade I and 2 at Grade II | Most Outstanding Business Student, Graduation 2015

Professional

- Anti-Money Laundering, Counter Financing of Terrorism & Compliance Training, JMMB Money Transfer, 2018
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Key Skills and Expertise

- **Technical:** Grasps and applies concepts quickly. Effectively used fundamentals of sales and finance to gain investment client buy-in, with some clients investing up to \$100K monthly.
 - **Communication:** Ability to engage and establish rapport with clients, analyse their needs and be responsive to improve customer service up to 35%, and enhance customer relationship management.
 - **Leadership:** Relied on by management for administrative support in analysis, accounting, monitoring compliance, vetting calculations for accuracy, recommendations for sales campaigns, and preparation of monthly reports.
 - **Interpersonal:** Respected by colleagues for teamwork and problem solving, resulting in boosted productivity.
 - **Information Technology:** Competent user of Microsoft Excel, Word, PowerPoint, and Access. Uses applications to automate tasks and enhance productivity.
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Experience & Accomplishments

COMPANY NAME, ADDRESS

Taxpayer Service Assistant

Month Year - Present

- Competently administers application processing and records management for an average of 6,000 customers monthly, for 5 high volume consumer and business transactions i.e. Driver's Licences, Trade Licences, Taxpayer Registration Number, Tax Compliance Certificate, GCT Registration, and Property Tax.
- Verifies and ensures accuracy of information and calculations on applications in line with guidelines.
- Improved customer service rating by 35% by analysing customer service gaps and implementing strategies to show responsiveness.
- Reduces wait time on busiest days up to 20% by implementing time-management strategies and promoting teamwork.

Taxpayer Service Assistant, Company Name Continued

- Resolves resource constraints. Respected as the “Go-to-Person” to fix equipment for high volume transactions, resulting in 35% improvement in productivity.
- Prepares accurate weekly transaction reports for management.

COMPANY NAME, ADDRESS**Teller****Oct 2017 – April 2018**

- Handled financial transactions inclusive of cash and cheque deposits and disbursing cash, with a high level of accuracy.
- Maintained a high reconciliation and balancing rate of 95 – 100%.
- Established rapport with customers, provided quality customer service and cross-sold company products i.e. loans, savings accounts, life insurance, and pension plans.
- Achieved monthly loan target, attaining an average of \$1.5M in sales monthly.

COMPANY NAME, ADDRESS**Sales Associate****Jan – October 2017**

- Met sales goals and targets for market share and growth, inclusive of 400 prospects and 20 new accounts per month. Had an outstanding 1st day on job by quickly grasping sales fundamentals, and analysing and implementing a winning strategy, resulting in 100 prospects with a 25% conversion to new customers. First investor client invested \$100K.
- Maintained high-level of customer service and accuracy of information provided to an average of 750 clients monthly, for the opening of accounts and ensuring proper supporting documentation submitted.
- Established positive rapport and introduced the company’s products and services to new and potential investors, especially the Money Managers Investment product.
- Developed and implemented appropriate sales strategies for selling and promoting investment products to targeted market and attracted clients who invested \$100k monthly.

COMPANY NAME, ADDRESS**Office Administrator/Salesclerk****March – September 2016**

- Ensured that customers’ shopping experience was remarkable and enjoyable by attending to an average of 1100 customers monthly, promptly and in a respectful manner.
- Monitored the store for compliance with store and airport policies, rules and regulations.
- Energized sales through analysis, recommendations and gaining buy-in from management on new products, sales campaigns and customer appreciation initiatives. The Father’s Day campaign resulted in 13% increase in sales and a dramatic increase in website visits. Exceeded weekly sales target by 25%.
- Supported the Administrative and Operational functions relevant to 100 different products and up to 10 staff members, inclusive of records management, accounting, inventory, payroll, purchasing and sales journals, and invoice reconciliations. Initiated formulas to calculate statutory and non-statutory deductions for payroll.

Professional Associations & Service

Circle K International | League of Extra-ordinary Women | Trelawny Youth Ambassadors | *Volunteerism* – Trelawny Parish Library, 2018 | | First Year Student Representative, University of the West Indies 2015/2016.