**OBJECTIVE**

Seeking a position in Finance with a reputable and well-established firm, that will provide me with the opportunity to obtain and contribute skills, experience, and to grow in pursuit of a professional designation.

**PROFILE**

* Excellent sales and people management skills
* Client driven with a strong focus on quality of service
* Reliable, responsible, team player with a strong work ethic
* Positive attitude, driven and ambitious
* Excellent well-rounded communication, interpersonal, analytical, and management skills
* Fast learner, problem solver, resourceful, and a leader
* Motivated by new challenges and experiences
* Strong in multitasking and able to manage schedules, meet varying deadlines and complete tasks
* Bilingual – **English** (Expert), **Arabic** (Basic), **French** (Basic)

**EDUCATION**

2011 **Bachelor of Commerce - Major Finance**

John Molson School of Business, Concordia University

Montreal, Quebec, Canada

**CERTIFICATION:**

2015 International Certificate in Wealth Management Level 3

Chartered Institute for Securities and Investment

Dubai, U.A.E

**AWARDS & ACHIEVEMENTS**:

2015Top Performance Award (**September**)

2012 **Annual ACHIEVER**

*Awarded to 5000 CIBC employees out of 40,000 worldwide   
Attended the Annual Achievers Business Conference in Rivera Maya, Mexico CIBC Achievers Recognition Program acknowledges the exceptional performance of individuals who demonstrate passion for their work, commitment to their clients, and live our core values of Trust, Teamwork and Accountability*

November – February 2014 **120 Day National Award**

*Top Team Quartile Results for Montreal Outbound*

September 2013 **Excel Award**

*Outstanding Leadership*

February – April 2012 **Quarterly Achievers Recipient**

*Top Overall Performance*

August 2012 **Excel Award**

*Outstanding Leadership  
Training Support Leader - Top Team Exceeded Expectations Nationally*

October 2011 **Excel Award**

*Living in The Growth Zone*

September 2011 **Rookie of The Wave**  
*Top Overall Performance in Training*

**WORK EXPERIENCE:**

**Premier Wealth Relationship Manager, April 2015 – September 2016**

**HSBC (Retail Banking and Wealth Management), Dubai, U.A.E**

* Acquiring, developing, overseeing and retaining relationships with high net worth clientele
* Conducting client meetings on regular basis to assess and review portfolios to ensure solutions are suitable and meet goals and objectives
* Develop financial goals by providing financial modeling, financial analysis, risk-tolerance assessments, and retirement illustrations based on objectives and risk profile
* Providing recommendations to clientele on protection, retirement, education and growing wealth needs.
* Preparing tailored asset allocation advice.
* Explaining and advising on complex financial products to clientele and key stakeholders, arranging hand-off to peers if required based on client’s needs.
* Working with broader branch and direct teams to ensure achievement of the business performance measures and plan
* Ensuring compliance with HSBC internal, AML, ATF, and operational risk controls in accordance with regulatory standards and policies.
* Maintaining a deep understanding and technical knowledge of relevant products and services available from Group sources and elsewhere in order to provide the best solutions for clients and maximize revenues
* Maintaining highest standard of excellence in client service across the team and with individual portfolio
* Ongoing analysis of client portfolios through marketing of ideas and researching clients
* Monitoring client satisfaction data implementing portfolio level improvements

**Team Leader (TB, Retail Markets), January 2013 – March 2015**

**Canadian Imperial Bank of Commerce (CIBC), Montreal, QC**

* Directing, coaching, supporting, monitoring, guiding and developing employees through various development techniques
* Training and coaching in lending, everyday banking and savings, investments, and credit
* Ensuring team meets and exceeds individual Business, Performance, Sales and Revenue, Client Experience, Productivity and Efficiency targets
* Ensuring team adapts to various changes by providing learning and development sessions
* Identifying and removing obstacles to maintain team at optimal level by conducting and assessing analysis on various qualitative and quantitative factors
* Mitigating between business, client and employee needs and ensuring success on all aspect
* Maintaining a highly motivated work environment through effective communication, consistent management practices and employee reward and recognition
* Ensuring all employees are current with all corporate, divisional and departmental information through written communication, team meetings and departmental meetings
* Completing formal Individual Development Plan process for all employees within given timeframes
* Ensuring performance assessments are effectively communicated in a timely manner
* Mitigating risk and enhance the client experience by ensuring employees are well educated and informed with tools and resources needed
* Supporting the implementation of process improvements and strategy changes
* Ensuring client concerns are resolved within divisional standards
* Ensuring compliance with CIBC internal controls, operational procedures and risk management policies
* Providing, reviewing and approving next action recommendations on client profiles
* Hiring, training and ensuring new employees meet all business expectations and targets

**Academy Bay Support Leader**, **June 2012 - January 2013**

**Canadian Imperial Bank of Commerce (CIBC), Montreal, QC**

* Assisting a team of new hires to a successful transition and integrate from training environment to respective roles
* Ensuring new hires are fully knowledgeable of CIBC product lines upon completion, lending, everyday banking and savings, investments, and credit
* Ensuring new hires successfully exceed and achieve consistent performance on a client, business and individual basis
* Delivering effective team presentations on daily basis
* Developing Team Building activities
* Preparing and delivered effective coaching on consistent basis
* Assisting new agents on the phone

**Financial Service Representative, July 2011- June 2012**

**Canadian Imperial Bank of Commerce (CIBC), Montreal, QC**

* Developing new and strengthening/expanding existing client relationships by providing financial solutions that meet client’s needs and goals, penetrating to all product and service lines
* Providing financial advise on lending, everyday banking and savings, investments, and credit needs
* Reviewing account information and processing clients requests
* Educating and providing financial advice and style solutions to clients objectives, needs, and inquiries in order to expand business
* Meeting sales targets by recognizing opportunities and actively promoting and providing products and services to meet client’s needs
* Supporting the efforts and goals of CIBC through personal sales of a wide variety of products and services
* Excellent knowledge and operations of a variety of database and procedures to achieve tasks (AST, COINS, TELAGENT, ECIF, SMART, Wealth Management, TS2, 3270 Application)
* Ensuring compliance with CIBC internal controls, operational procedures and risk management policies
* Pursuing on-going education of CIBC products, services, and other lines of business

**COMPUTER SKILLS**

* AST, COINS, TELAGENT, ECIF, SMART, Wealth Management, TS2, 3270 Application
* Microsoft Office XP, Microsoft Office 2000, Microsoft Office 1997, MS Word, MS Access, MS Excel, MS FrontPage, MS Project, MS Visio, Internet Explorer, MS Outlook, PowerPoint, Adobe Professional

**EXTRA CURRICULAR/VOLUNTEER ACTIVITIES**

July 2013 **PME-Peoples Management Essentials Certification**  
*7 day program, completed in Halifax, NS*

2013 – 2015 **Member of Charity Committee**

*CIBC Montreal Contact Center  
Run for the Cure, United Way, Make A Wish, JDRF, Adopt a Child, Charles Bruneau, Sun Youth Food Drive*

October – December 2013 **Lead the CIBC United Way Campaing for Montreal**   
*Increased contributions by 45% in 2013 from previous years*

2009 **Professional Risk Managers' International Association**

2009 **PRIMIA Career Day Volunteer**

*Registered and provided information to speakers, guests and students upon entrance*

2009 **Volunteer - Sustainable Business Conference**

2009 **John Molson Sustainable Business Group**

*Organizing prior to the event*

*Registered speakers, guests, faculty and students upon entrance*

*Provided information regarding the event to guests, faculty and students*

*Handed out gift bags, brochures, event schedules*

*Directed guests faculty and students*

**REFRENCES**

Available upon request