**Jehana**

*C/o-*  ***Mobile*** *+971505891826* ***Email*** [*jehana.344627@2freemail.com*](mailto:jehana.344627@2freemail.com)

**ProfessionalSummary**

***Highly motivated***, ***results oriented*** and ***dynamic individualwith over 13 years of professional experience***in***Retail Banking and Wealth Management.Focused mind set*** to ***deliverservice excellence*** whilst adhering to a ***customer centric approach.*** Main objective is to ***establish strong stake holder relationship*** by ***building rapport through a friendly, positive and highly professional manner*** while ***ensuring operational integrity*** and ***financial performance to the business***.

**Professional Experience**

***Relationship Manager July 2011 –Oct 2016***

*HSBC Premier Centre, Colombo*

***Duties and responsibilities***

* ***Responsibility and accountability of managing a portfolio consisting approx. 250 affluent high net worth clientele*** (HSBC Premier Customers)
* ***Manage*** and ***ensure portfolio growth*** both ***efficiently and effectively*** by means of:
* ***Effective cross selling of bank products and services*** to existing customer base
* Acquisition of new clientele by ***successful sales follow ups and closure***
* ***Effective contribution*** towards growth of Assets, Liabilities and Revenue ***through***

***Portfolio Management Strategies and Relationship Management***

* Offer Wealth Management products upon ***detailed analysis and assessment of***

***the risk appetite of clients***

* ***Maintain high awareness and knowledge*** on banking legislation and compliance
* ***Conduct comprehensive customer reviews*** based on a risk centric approach ***using CRT (Customer Risk Analysis Tool)*** and***CDD (Customer Due Diligence) Analytics***
* Drive sales and service through ***active use of CRM analytic tools*** such as ***CRMS*** (Customer Relationship Management System), ‘***Management Information’*** reports/databases and **CMS** (Complaint Management System)

***Key Accomplishments***

* Awarded ***Best Premier Center Relationship Manager-Runner Up for 2011***and felicitated at Banks Awards Night in 2012.
* Promoted to Premier Center Relationship Manager (RM) in July 2011 due to ***significant over achievement of sales and revenue targets***. Opportunity to manage a mature, profitable portfolio which generates an annual income of approximately LKR59 Million
* Awarded ***Certificate of Achievement for significant recovery and settlement of bad and doubtful debts*** in a premier relationship managed portfolio in June 2013
* Award ***Winner for the success story*** under “The Global Standards - I make a difference campaign” for 3rd quarter 2015. ‘HSBC Sri Lanka’ was recognized by the HSBC group for the first time for an accomplishment of this nature as part of Global Standards Campaign launched group wide
* Awarded ICA ***Certificate in Anti Money Laundering and Sanctions Compliance with Distinction*** from HSBC in association with Manchester Business School, The University of Manchester, UK

***Counter Operations Officer/Chief Cashier Sep 2007-July 2009***

***HSBC Retail Banking (Branch Operations)***

***Duties and responsibilities***

* ***In charge of the overall cash operations*** at branch level and ***ensure seamless counter operations*** and ***maintain consistent levels of service***
* ***Coach, develop staff*** on key areas covering all aspects on ***knowledge, operations and service***

***Key Accomplishments***

* Awarded ***Certificate of Achievement for efficient performance and successful task management*** handling large cash operations and volumes at Counter Operations during the SAARC summit held in Sri Lanka
* ***Recommendations*** from Chief cashier Main Office Branch, Corporate Relationship Managers and Corporate Sales Teams for ***internal service and support***
* Awarded ***Certificates of Excellence for exceptional Sales and Service Performance***

**Overall Experience at HSBC**

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| --- | --- |
| ***Premier Relationship Manager*** | ***July 2011 –Oct 2016*** |
| ***Branch Premier Relationship Manager*** | ***July 2009 - June 2011*** |
| ***Counter Operations Officer*** | ***May 2007 - July 2009*** |
| ***Banking Assistant*** | ***Feb 2003(Date joined)-May 2007*** |

**Professional and Academic Qualifications**

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| ***Master in Business Administration-MBA, UK***  *University of Wales, Institute of Cardiff-UWIC* | ***Mar 2011- Nov 2012*** |
| ***Associate Member and Diploma in Banking and Finance- DBF, SL***  *Institute of Bankers, Sri Lanka* | ***Sep 2007- Mar 2011*** |
| ***Graduate Diploma in Business Administration- AMABE, UK*** *Association of Business Executives-ABE, UK* | ***Dec 2003- Dec 2005*** |
| ***International Diploma in Computer Studies- IDCS, NCC UK*** | ***Apr 2002- Apr 2003*** |

**Personal Details**

**Date of birth** 11 December 1982

**Marital Status** Married

**Nationality** Sri Lankan, Malay