

# Cassandra Sook Ting LEUNG

## Personal Summary

A Client Service Executive at a local bank, Cassandra is able to generate client leads, accurately assess clients' needs, recommend suitable banking products and handle clients' enquiries.

Due to her experience in banks and financial companies, Cassandra has developed resourcefulness, high adaptability and an unwavering determination for meeting and exceeding the targets set for her. Her client service experience has also instilled in her effective communication skills, the ability to work collaboratively and the ability to excel in a fast-paced environment.

## Work Experience

### XXXXX Bank

CLIENT SERVICE EXECUTIVE (SMEs) 20XX - Present

Responsible for handling client enquiries regarding SME loans, servicing clients from countries such as USA, UK and China.

- Identify and reach out to 6 to 8 prospective clients weekly.
- Perform on-site visits and travel to other branches to meet clients.
- Perform analyses of overseas and local clients' financial positions by studying financial statements and gathering information about clients' assets, liabilities, owners' equity from clients' subsidiaries and parent companies.
- Ensure that all necessary documents are present before submitting for loan approval.
- Process 8 to 10 loan reviews weekly.
- Meet monthly loans target of 3 million HKD.
- Mentor and provide guidance to 4 newcomers on the team.
- Process housing mortgage loans when necessary.

### XXXXX Limited

CLIENT SERVICE EXECUTIVE 20XX – 20XX

Responsible for handling client enquires regarding loans (SME, personal and housing mortgages)

- Identified and reached out to 2 – 3 prospective clients weekly.
- Processed 4 million to 7 million HKD of loans per month.
- Handled about 10 mortgage applicants per month.
- Performed analyses of clients' financial positions by studying financial statements and gathering information about clients' assets, liabilities, owners' equity from clients' subsidiaries and parent companies.
- Ensured that all necessary documents are present before submitting for loan approval.
- Prepared reports on SME loans.
- Processed 8 to 10 loan reviews per week.
- Met monthly loans target of 3 million HKD.
- Personal best performance: 10 million HKD.

## CONTACT DETAILS

Telephone: +852 XXXX XXXX

Email: name@gmail.com

## KEY COMPETENCIES

- Proactive in generating new prospects and marketing the banking products.
- Accurately assesses the needs of the clients and recommends appropriate banking products.
- Anticipates the needs of the clients and recommends suitable banking products.
- Communicates with customers from diverse backgrounds and communicates effectively with the sales team to ensure that quality customer service is delivered.
- Handles complaints and resolves issues for customers.
- Ability to work independently.
- Willingness to share responsibility and work collaboratively.
- Ability to multi-task, handle stress and work in a dynamic and fast-paced environment.

## PERSONAL QUALITIES

- Communicates effectively
- Highly adaptable
- Passion for learning
- Positive attitude and energy
- Persevering
- Resilient
- Global mindset and cultural sensitivity.

## IT SKILLS

- Microsoft Office (with special focus on Access, Excel, PowerPoint)

**XXXXX Limited**

CLIENT SERVICE EXECUTIVE

20XX – 20XX

Responsible for handling client enquiries about the various products offered by the bank and providing support to the front line sales team.

- Handled about 100 client enquiries per week regarding products such as consumer loans (auto-loans, personal loans, and tax loans), credit cards and other general banking products.
- Marketed and cross sold credit cards, consumer loans and other general banking related products in a high volume call center.
- Assisted the front line sales team by confirming clients' orders in credit card applications, loan applications and general banking transactions.
- Met monthly target of 3.5 million HKD for card loans.
- Personal best performance: 8 million HKD.

**Emigrated to Shanghai**

20XX – 20XX

Caregiver to her firstborn. Utilized time-off from work by keeping up on IT skills.

- Advanced in Access, Excel and PowerPoint through self-directed study.
- Gained invaluable exposure to local culture.

**LANGUAGE PROFICIENCY**

- English: full professional working proficiency
- Chinese (Putonghua): professional working proficiency
- Cantonese: native proficiency

**REFERENCES**

Available upon request.

**AVIALABILITY**

A month's notice

**Academic Qualifications****XXXXX University**Business Administration (*coursework in progress*)

20XX - Present

**XXXXX College of Careers**

Attained certificate in Tourism Business

20XX – 20XX

**XXXXX Institute for Further & Adult Education**

Attained Hong Kong Certificate of Education Examination

19XX – 19XX

**XXXXX College**

Secondary education

19XX – 19XX