

# MARK JHOMER Q. TAN

## CUSTOMER SERVICE ASSOCIATE



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### CAREER HIGHLIGHTS

Dynamic individual with a successful career in Banking and Finance for more than three years predominantly in the areas of retail banking, sales and customer service. Moreover, conducts client due diligence to ensure the quality of KYC of an individual.

### ACHIEVEMENTS

- Worked as a Bank Teller for a year and promoted as New Accounts Associate.
- Awarded as Credit Card Champion for the Year 2022 - March 2023
- Awarded as Top Performing Service Associate in Bancassurance Category as highest number of ANP generated for the Year 2021
- Recipient of the award Top Performing Branch in Auto Loan for the Year 2022
- Recipient of the award Top Performing Branch in CASA Generated for Financial Year 2022
- Graded as "Low Risk" by PNB IAG in recent concluded Internal Audit for Branch

### EXPERIENCE



**Philippine National Bank**

**Customer Service Associate**

**November 18, 2019 - March 31, 2023**

#### Bank Teller Functions:

- Accepts deposit and bills payments/collections
- Pays encashment of checks and withdrawals
- Verifies technicalities of check deposits
- Verifies signatures of clients
- Establishes identity of person(s) making withdrawals or encashment
- Ensures that all checks received during the day have the required bank endorsements stamped at the back thereof.
- Processes incoming clearing items and outgoing checks for clearing.
- Balances Teller's Totals at the end of the day
- Prepares required branch reports on a timely basis

### EDUCATION

La Consolacion College  
Batangas, Philippines

**BACHELOR OF SCIENCE IN  
BUSINESS ADMINISTRATION  
MAJOR IN FINANCIAL  
MANAGEMENT**

### KEY SKILLS

- Strong Organization Skill
- Leadership Skill
- Communication Skill
- People Skill
- Verbal and Written Skill
- Creative and Innovative thinker
- Team player

### TECHNICAL EXPERTISE

- Microsoft Office Applications
- Knowledge on Centralized Watchlist System
- Knowledge on Customer Risk Rating Tool
- Knowledge on Branch Banking System
- Azzentio Tool

### LANGUAGE

Fluent in writing and speaking English

### VISA STATUS

Visit Visa

**New Accounts Functions:**

- Interviews clients on their financial needs; offers appropriate products or services and secures requirements from the client on the opening of accounts.
- Processes opening of new accounts
- Secures client’s signature
- Updates Client Information Form of existing customers
- Monitors maturity of term placements
- Processes requests for Bank Certifications, Bank Statements, ATM Card replacements, and lost Passbook replacements
- Processes payment of fund transfers(remittance)
- Processes closing of accounts
- Attends to customer inquiries, requests and suggestions making sure that these are immediately addressed/resolved to client’s satisfaction; refers/elevates complaints to the supervising officer for appropriate action if necessary.
- Conducts telephone calls to promote and follow up on the products offered to clients
- Offers bank products to walk-in clients
- Performs other duties that may be assigned from time to time.

**KYC Functions:**

- Verifies the ID of the client. Detailed ID verification includes the following: type of ID presented, ID Number, expiration date, correct spelling of the name, and present or permanent address of the client.
- Verifies the signature of the client on the ID.
- Identifies the source of fund/wealth of the customer
- Proper and correct filing of necessary documents of clients

TRAININGS

AML Home Study Program  
Batangas, Philippines

Teller's Training Program  
Pasay City, Metro Manila

New Accounts Seminar  
Pasay City, Metro Manila

Counterfeit Detection Seminar  
Pasay City, Metro Manila

Signature Verification Seminar  
Pasay City, Metro Manila

**PROFILE**

Marital Status:Single

Birthdate:November 20, 1998

Nationality:Filipino