

Gale Ann S. Baltazar, MBA

Address: Eclipse Tower B, Al Reem Island

Abu Dhabi City, United Arab Emirates

Contact Number: +971551544984

Email Address: sgaleann@yahoo.com



Objective

To obtain a position where I can share my knowledge, almost eight year experiences and expertise in branch banking, sales and customer service.

Skills

- Excellent interpersonal and communication skills
- With good analytical skills and attentive to details
- English language proficient
- Can work in a fast phase environment
- Has knowledge in bank's products, guidelines, policies and services
- Has signature verification training
- Has peso and third currency analysis training
- Knows "KYC" "AML" and "Risk Profiling"
- Knows Microsoft Applications (Microsoft Word, Excel, PowerPoint Presentation)
- Knows how to use SPSS program
- With honesty and integrity at work
- Can work with minimal supervision
- Team leader and Fast Learner
- Has knowledge in using teller for signature, AS-400, BCX, Icos, Remote Deliver Channel and other bank applications or programs

Professional Experience

Working at Banco De Oro Unibank, Inc

Date Hired: August 01, 2014 – Present

Position Handled: Customer Service Associate and Marketing Assistant

Customer Service Associate (Bank Teller: High and Low Counters)

Responsibilities:

- Perform over the counter bank transactions with thoroughgoing efficiency following strict guidelines to overall Bank and Group policies.
- Handling of multiple deposits, withdrawals, encashment, transfer of funds, buying and selling of peso and USD notes
- Process over the counter payments for any types of loans, credit cards, utilities and other bank approved payments
- Releasing of remittances, creating demand drafts, managers checks and statement of accounts as requested
- Performs signature verification in every withdrawals, encashment and 3rd party transactions

- Cross selling of banks products and services
- End of the day balancing and turnover of cash to service officer

Marketing Assistant

Responsibilities:

- Answers customers inquiries with regards to banks products and services
- Provide best solutions to customers complaints
- Refer customers to appropriate bank personnel to assist their needs
- Continues generation of customers that will help the branch to build sales
- Carry out continuous lead generation activities for investments products
- Conduct financial needs analysis and recommend solutions for unit investment funds
- Opening of new accounts, time deposits, unit investment funds products
- Creating of bank certifications
- Enticing and assisting clients for credit card, home loans, auto loans applications
- Create and update customer information records
- Responsible for proper identification of clients through "KYC", "AMLA" and Risk profiling before opening of an account, In addition checking if they are connected to politically exposed personnel, FATCA, high valued clients, or they work in high risk countries
- Responsible for signature verification and checking for the validity of accepted identification cards
- Filing and safe keeping of all the signature cards, customer information files, terms and conditions, copy of identification cards, NLDS and PEP files.
- Creating, linking and assisting clients with regards to ATM cards.
- Ensure that customers are protected with banking laws especially with Republic Act 1401.

Achievements

- Graduated with the degree of Master in Business Administration at Lyceum of the Philippines University- Batangas year 2018
- Consistent BDO –Life formerly known as Generali Philippines top branch awardee for year 2014- Present
- Elected as a Union Steward holding the responsibility of a leader for staffs in the branch
- Organize all the account opening files for the 40 year old branch after its renovation year 2019
- Responsible for handling the exchange and releasing of migrated EMV Cards for the large branch year 2018

Trainings

- Teller Training Program
- Advance Branch Service Training- Low Counter
- Marketing Training Program
- Basic UITF 101 Training
- Online Account Opening Training

Personal Information

Age: 29

Birthdate: September 29, 1993

Religion: Roman Catholic

Status: Married

Educational Background

Primary and Secondary: Saint Bridget College-Batangas City SY: 2006-2010

Tertiary: De La Salle University Lipa SY: 2010-2014

Graduate School: Lyceum of the Philippines University Batangas SY: 2016-2018

Character References

Ms. Wendy Martin

Area Sales Leader for BDO Life

Contact Number: (+6343) 723-5976

Ms. Katherine S. Brucal

Service Officer- BDO Rizal Avenue Branch

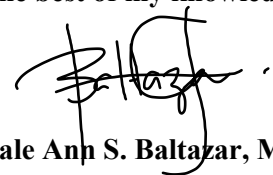
Contact Number: +639177995730

Ms. Mirinda S. Manalo

Marketing Officer- BDO Rizal Avenue Branch

Contact Number: +639171003834

I hereby certify that the above information are true and correct as to the best of my knowledge.



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