

# Meredeth Therese C. Velasco

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## Professional Experience

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### **CHINA BANKING CORPORATION | November 2017 – Present**

#### **Marketing Assistant II**

*Internal Transfer from Marketing Unit to Processing Unit in February 2020*

##### Processing Unit

- Assessed loan files for completeness, identified missing documentation and generated condition lists for applicants.
- Assessed financial statements and contacted concerned unit for clarification.
- Evaluated approvals against established bank lending standards.
- Acquired management approval for loan products, including small business and commercial loans.
- Processed loans within various departments to achieve timely, accurate and fair proceedings.
- Provided quick turnaround times to maintain fast-past schedule.
- Assisted Clients in loan signing and other inquires

##### Marketing Unit

- Processed, examined, and identified lacking documents prior to endorsement for processing.
- Worked with customers in person and via telephone to answer questions, process transactions and resolve issues.
- Interviewed clients regarding loan needs and financial histories and conveyed information regarding application processes.
- Verified credit histories, personal references and employment backgrounds for each applicant.
- Communicated with customers daily to request information and complete paperwork.
- Assists the clients in the signing of loan documents and with post booking concerns and inquiries;
- Communicated acceptance or rejection to applicants via mail, email, telephone or personal consultations.
- Actively listened to customers' requests, confirming full understanding before addressing concerns.
- Assisted in developing and maintaining relationships with borrowers, realtors, and other referral sources;
- Assisted loan officer in the processing and closing of real estate mortgage loans.
- Trained newly hired team members

### **CHINA BANKING CORPORATION | November 2015 – November 2017**

#### **Marketing Assistant I**

- Pre-screens and encodes received applications;
- Conducts office file checkings on borrowers to ensure that clients have no negative findings and to check relevant loan exposure in the bank;
- Provided technical advice, guidance, and credit counseling to loan applicants and borrowers;
- Reviewed completeness and accuracy of loan documents and requirements;
- Coordinated with developers or clients for any deficiencies prior to submission for loan processing;
- Assisted in the preparation of loan packages;
- Assisted clients in the signing of loan documents;
- Assisted in developing and maintaining relationships with borrowers, realtors, and other referral sources;
- Forwarded loan documents to the other units of the bank for review and booking;
- Assisted loan officer in the processing and closing of real estate mortgage loans;
- Conducted telemarketing activities

**Global Meeting Services/ Data Processing Analyst,| February 2015 – July 2015  
ASIAPEOPLE WORKS! INC. - Deployed to Institutional Shareholder Services)**

- Monitored corporate action events such as shareholder meetings from EGDAR;
- Procured meeting documentation such as Annual Reports, Notice of Meeting, Information Circulars, Proxy Forms and other corporate governance documents;
- Collected meeting details such as the date, type, record date, location, time and voting instructions;
- Asserted voting securities (ISIN, SEDOL, CUSIP and CINS) in a meeting;
- Extracted the meeting agenda and encoded it in the database to make clients aware of the agenda/resolutions to be voted upon;
- Inputted correct voting instructions such as valid vote options, market deadline Date and details of the Registrar; and,
- Collected results of the meeting and inputted each in the database.

## Education

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*MAPÚA INSTITUTE OF TECHNOLOGY – Makati*

Bachelor of Science – Business Administration major in Marketing, *October 2015*

## Skills

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- Attention to details and focus on quality
- Good keyboard skills to include MS Excel and ability to learn systems used within the business
- Be able to work as part of a team with minimal supervision
- Ability to work under pressure meeting challenging deadlines
- Ability to review and resolve complex issues
- Excellent planning and organisation skills
- Customer Service