

Isabel Montalban-Urbano

Financial Sales Associate

A growth oriented and a performance driven person who's always a willing-to-learn attitude



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📍 Philippines

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WORK EXPERIENCE

Tax Assistant

Philip Morris Fortune Tobacco

06/2014 - 12/2014

27th flr Tower One, The Enterprise Tower, Ayala Ave. Makati city

Achievements/Tasks

- Admin task
- Data Encoding
- Tax Filing at BIR
- Computing Tax input and Ouput
- SAP

Financial Advisor

SunLife Of Canada Philippines

03/2015 - 03/2017

Laurelwood branch, 2/F ACE Bldg. 101 Rada St. Legaspi village, Makati City

Achievements/Tasks

- Sales Presentation about the insurance product
- Conducting financial literacy seminars for employee, organizations, company and individual
- Direct selling and cold calling leads to reach wide range of prospects.

Financial Sales Associate

Manulife-Chinabank Life Assurance Corp

06/2019 - Present

10th / F NEX Tower, Ayala Ave. Makati City

Achievements/Tasks

- Meet with clients to discuss financial goals, investment timelines, and risk tolerance
- Developing and sustaining long-term relationship with the clients to encourage repeat business and client referrals
- Monitoring market conditions to determine how various changes may impact on client's investment.
- Telemarketing

EDUCATION

Business Administration major in Financial Management

Far Eastern University

SKILLS

Social Media Marketing

Direct selling

Problem-solver

Detail oriented

customer service

Excellent communication and interpersonal skill.

Microsoft Literate

Excellent presentation skills

Admin jobs

Data encoding

Email Marketing

Telemarketing

ACHIEVEMENTS

2021 Elite Club Member

These are our internal organization that hits the target gouta earlier than expected

2021-2022 Achiever's Guild Award

These are awarded to those who exceeded their annual sales gouta.

February 2022 Digital Champion

Awarded as One of the Top sales associate with most numbered submission of cases using the company's digital platform .

LANGUAGES

English

Full Professional Proficiency

Filipino

Full Professional Proficiency

INTERESTS

Economics

Stock Market

Insurance

Graphic design

Research