

JIM P. CERALDE

LICENSED FINANCIAL ADVISOR

✉ jimceralde@gmail.com

📍 305 Bonuan Boquig, Dagupan City Pangasinan

☎ +63950-8957312

PERSONAL PROFILE

I have a clear, logical mind with a practical approach to problem-solving and a drive to see things through to completion. I have more than 5 years of experience in managing and operates across multiple fields. I am eager to learn, I enjoy overcoming challenges, and I have a genuine interest in Business Management and making organizations successful.

WORK EXPERIENCE

FINANCIAL SALES ASSOCIATE

Manulife - Chinabank Life Assurance - July 17, 2023 - Present

- Deliver the sales production targets in his/her area assignment
- Focusing on driving Worksite Marketing business via employers in the corporate commercial segments of in-branch and institutional banking channels
- Train and coach Relationship Manager in the referral process of corporate and commercial accounts
- Generate and submit all reports requested by management timely and accurately.

LICENSED FINANCIAL ADVISOR

BPI AIA - April 2022 - July 6, 2023

- Cross-sell and upsell BPI-Philam products to BPI customers
- Establish, maintain and grow good relations with bank partners in the branch, and prospective and existing clients of BPI
- Provide excellent customer service and aftersales service to clients of BPI
- Prepare, submit and analyze sales reports regularly
- Attend weekly meetings with bank parts and Bancassurance Area Managers for production updates and marketing campaigns

LICENSED FINANCIAL ADVISOR

Eastwest Ageas Life Insurance - February 2021 - April 2022

- Conduct financial planning and recommend Troo solutions to EastWest Bank customers - to understand their financial needs and help them achieve their goals
- Solicit new business, cross-sell, and up-sell to EastWest Bank's customer base
- Manage process flow from application to delivery and after-sales service; perform customer service and business conservation
- Handle activity planning and reporting both to the Sales team and to the bank partner
- Attend regular meetings with the Sales team

SALES SUPERVISOR

PICAR DEVELOPMENT INC. | November 2019 - December 2020

- Advise clients on market conditions, prices, mortgages, legal requirements and related matters.
- Accompany buyers during visits to and inspections of property, advising them on the suitability and value of the homes they are visiting.
- Advise sellers on how to make homes more appealing to potential buyers.

LOANS OFFICER

AMA BANK, A Rural Bank of Mandaluyong | August 2017 - November 2019

- Initiates and ensures that the back office department projects
- Monitors the service quality level of the back office operations
- Facilitate checking and verification of DepEd Salary Loan Application in accordance with the policies

ASSISTANT MANAGER FOR OPERATIONS

Eastwest Rural Bank | January 2015 - May 2017

- Managing internal transactions within the branch
- Reports daily to the Manager and in Head Office
- Assists employees and clients with their concerns

SALES ADMIN STAFF

Toyota Dagupan City, Inc. | December 2012 - January 2015

- Transacts daily report for Sales Admin Manager
 - Mortgage and documents for Marketing Professionals
 - Inventory report and manual checking of units within the premises
 - Transacts with other dealer to swap units if needed
 - Monitoring of tools of a unit if complete and ready to release
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EDUCATION HISTORY

Colegio de Dagupan

Bachelor of Science in Information Technology, 2012

Bonuan Boquig Nat'l High School

Leon Francisco Maramba Elem Sch.

OTHER SKILLS

- Computer proficiency
 - Leadership experience
 - Communication skills
 - Organizational know-how
 - People skills
 - Collaboration talent
 - Problem-solving abilities
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CHARACTER REFERENCE

Mr. Franz Ritz De Vera
Development Management Officer II
Department of Health – Center for Health Development I
Mobile: 0992-3006249

Mrs. Armielyn C. Fernandez
Bancassurance Sales Executive
BPI AIA
Mobile: 0985-3587778

Mr. Rogereu Paguyo
Manager
Picar Development, Inc.
Mobile: 0905-5195308

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



Jim P. Geralde
Applicant