

DIANA M. MORALES

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Saskatchewan, Canada

PROFESSIONAL SUMMARY

- Accomplished and results-driven Financial Advisor with extensive experience at BDO Life Assurance Company Inc., demonstrating a strong track record in understanding clients' financial objectives and delivering personalized financial plans.
- Adept at managing time efficiently in a fast-paced environment, ensuring smooth operations and client satisfaction. Proven expertise in customer service, communication, problem-solving, attention to detail, and time management, acquired through the intricacies of financial advisory responsibilities.
- Seasoned Service Crew Member and Cleaner with over four years of experience in fast-paced hospitality settings. Demonstrates excellence in customer service, adept at maintaining high standards of cleanliness and hygiene. Excels in fast-paced environments, ensuring customer satisfaction and safety.

WORK EXPERIENCE

Financial Advisor

July 2018 – January 2024

BDO Life Assurance Company Inc.
Makati City Philippines

- Assessed clients' financial needs by conducting in-depth interviews and analyzing their financial status, goals, and risk tolerance.
- Developed personalized financial plans tailored to each client's objectives, considered factors such as income, expenses, investments, and future financial obligations.
- Recommended investment strategies and products based on thorough market research and a comprehensive understanding of the client's profile and preferences.
- Reviewed and revised financial plans regularly, adapted them to changing market conditions, life events, or modifications in clients' financial goals.
- Educated clients on various investment options and associated risks provided clear explanations to facilitate informed decision-making and ensured alignment with their objectives.

Service Crew

July 2016 – May 2018

David's Milktea Shop
Caloocan, Philippines

- Greeted customers warmly as they entered the shop, providing them with menus and answering any initial questions they had about the offerings.
- Took customer orders accurately, including customizations and special requests, ensuring each beverage was made to the customer's satisfaction.
- Prepared and served milk tea and other beverages, adhering to specific recipes and presentation standards set by the shop.
- Processed payments from customers, handling cash, credit/debit cards, and mobile payments, and provided change and receipts as needed.
- Managed inventory and restocked supplies, including tea, milk, sugar, and other ingredients, as well as cups, straws, and napkins, to ensure the shop was well-equipped to serve customers without interruption.

Cleaner

Peter Lina Meat Shop
Caloocan, Philippines

February 2014 – June 2016

- Cleaned and sanitized all areas of the meat shop, including the cutting area, counters, and equipment, ensuring a hygienic environment compliant with health regulations.
- Washed windows, swept floors, and mopped spillages promptly to prevent accidents and maintain a clean appearance.
- Disposed of waste materials and by-products correctly, following the shop's waste management procedures and local regulations.
- Conducted deep cleaning tasks on a scheduled basis or as directed by management, including defrosting freezers, cleaning refrigeration units, and sanitizing storage areas.
- Collaborated with the meat shop staff to ensure that cleanliness and sanitation standards were consistently met, contributing to the overall customer satisfaction and safety.

EDUCATION

Bachelor of Science in Business Administration

2014 – 2018

Major in Human Resource Development Management

University of Caloocan City

Caloocan City, Philippines

SKILLS

- Communication and Interpersonal Skills
- Cash Handling and Customer Service Excellence
- Business Continuity Management
- Inventory and Operational Risk Management
- Surface Cleaning and Sanitization
- Problem-Solving and Multitasking Abilities
- Attention to Detail and Time Management
- Teamwork and Collaboration
- Adaptability and Resilience

CERTIFICATIONS AND TRAININGS

- Barista NC III
Technical Education and Skills Development Authority
Philippines