



# JENNILYN C. ROSALES

Senior Associate

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## SUMMARY

With 15 years of experience in the financial services sector, I bring a wealth of knowledge and expertise to my role of assisting the Financial Advisers. Demonstrated ability to improve sales and good customer service. Detail oriented with skills to meet client needs.

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## EXPERIENCE

Executive Offshore Assistant | July 3, 2023 – Present

***Homestead Financial Group Ltd***

Provide a wide range of support services, from preparing Fact Find, Reverse Fact Find and Return of Advice, handling clients inquiries and providing administrative support.

Sales and Service Associate | April 2011 – July 2023

***Philippine National Bank***

Responsible for balancing branch totals, clearing, preparation and submission of reports and other related back-office functions. In-charge of account opening and other platform functions; deposit account servicing, processing of payments, receipts, and monetary transactions.

New Accounts Clerk and Transaction Verifier | June 2008 – April 2011

***Penbank Inc***

Performing day to day financial transactions, including verifying, classifying, and recording tellers transactions. In charge of account opening and conducting KYC to new clients.

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## EDUCATION

Bachelor of Commerce Major in Banking & Finance

University of San Jose-Recoletos, Cebu Ph

Graduate 2008

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## **SKILLS**

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- Customer Service
- Product Knowledge
- Retail Banking
- Interpersonal Communication Skills
- Cash Handling
- Basic Accounting
- XPLAN
- Worksorted
- Salesforce
- Reverse Fact Find, Fact Find, Return of Advice

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## **CHARACTER REFERENCE**

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