

Charles Joseph V. Ramos II

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71 A.T. Reyes St., Mandaluyong City, Philippines, 1550

PROFESSIONAL SUMMARY

To be part of an institution that will allow me to grow both personally and professionally. To be involved in an organization where I can utilize my skills and knowledge regarding commerce, sales, marketing, and financial management.

WORK EXPERIENCE

Senior Investment Counselor

Sep 2023 - Present

Security Bank Corporation • Makati City, Philippines

An Investment Counselor is responsible for growing the revenue of the Investment Solutions Group by selling Swap Investments, Fixed Income and various securities.

Senior Investment Advisor

Jul 2018 - Aug 2023

Bank of the Philippine Islands • Makati City, Philippines

An Investment Advisor is responsible for growing the revenue of the Global Markets Segment/ Investment Solutions Division by selling Collective Investment Schemes (CIS), various securities, segregated portfolios and Hedged Funds.

Account Officer

Aug 2016 - Jul 2018

Bank of the Philippine Islands - Century Tokyo • Makati City, Philippines

The Account Officer is a marketing, credit and remedial officer and, as such, is responsible for generating and maintaining a profitable relationship with targeted multinational companies and top corporate clients.

Portfolio and Trading Assistant

May 2015 - Jul 2016

United Coconut Planters Life Assurance Corporation • Makati City, Philippines

(Portfolio) Assist the Fund Manager in portfolio management activities. Conducts analysis and regular review of the portfolio and makes a recommendation of sound investment outlets. Checks the accuracy of the financial reports as prepared by the Fund Admin Accounting. Responsible for monitoring and reporting of specific investment accounts and the preparation of corresponding schedules/reports and analysis as required by management. Ensures all reportorial reports required to be submitted to the Insurance Commission or any other government supervising authorities are submitted as scheduled. (Trading) Execute the purchase and sell instruction of the Fund Manager for the Time deposit placement, Treasury Bills (FXTNs), Bonds and other fixed income investments. Monitors current market prices and/or rates to ensure best return and help maintain company's position in achieving its profitability goals.

Collections Specialist

May 2014 - Apr 2015

Emerson Electric Asia ROHQ LTD. • Quezon City, Philippines

Manage assigned Collection portfolios following the specified strategies of the Business Unit by establishing and maintaining positive working relationships with our customers' Accounts Payables department. And provide excellent customer service by promptly addressing requests for account information, adjustments, and credit issuance according to Business Unit processes.

EDUCATION

Master in Business Administration

May 2017 - Jul 2019

Far Eastern University • Makati City, Philippines

The Master of Business Administration (MBA) program of Far Eastern University is composed of 18 credit units of core courses in the functional areas of business management and 12 credit units of elective courses in specialized business topics. The program is concluded with a 6 credit-unit thesis or capstone course. The MBA program offers the highest educational standards in business education through a practice-oriented curriculum that will be suitable for professionals who desire top-of-the-line continuous education for supervisory and managerial positions.

**Bachelor of Science in Business Administration
Major in Financial Management**

Oct 2010 - Apr 2014

Far Eastern University • Manila City, Philippines

- Latin Honor (Cum Laude)
- Consistent Academic Scholar

SKILLS

- Excellent communication skills
- Wise decision-maker
- Knowledgeable in computer applications and software.
- Excellent leadership skills
- Good in time management
- Fluent in English and the vernacular

PROFESSIONAL CREDENTIALS

- Certified Treasury Professional
- Certified Fixed Income Salesman
- Certified Investment Solicitor (Mutual Funds)
- Certified Treasury Professional
- Enhanced Unit Investment Trust Fund Certification

VOLUNTEER WORK

Chorister 2010 - 2014
Far Eastern University Chorale • Manila City, Philippines

Chorister 2006 - 2018
The Lighter Side Movement Choir • Mandaluyong City, Philippines

AWARDS AND HONOURS

Latin Honor - Cum Laude 2014