CLAIZA KAREN A. VIERNES

INFO

Plaridel, Bulacan, Philippines

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ckviernes18@gmail.com

EDUCATION

Centro Escolar University
Bachelor of Science in Business Administration
Major in Management
Manila, Philippines
(2013-2015)

PROFESSIONAL AFFILIATION

Passed the Non Traditional and Variable Insurance License - August 2022

PROFESSIONAL SUMMARY

Dynamic professional with a background as a Mobile Business Banking Sales Analyst, and experience as a Customer Service Representative and New Accounts Clerk. Efficient Administrative Assistant. Proven ability in sales analysis, customer service, and administrative support. Eager to contribute expertise and drive results in a new professional challenge.

REFERENCES

Anna Jasmin R. Trinidad
Business Area Manager
BPI AIA LIFE ASSURANCE CORP.
AnnaJasmin-E.Rance@aia.com
09173289113

Cherry P. Trinidad
Branch Manager
Metrobank
Cherry.trinidad@metrobank.com.ph
09178508058

PROFESSIONAL EXPERIENCE

August 2022- up to Present
Mobile Business Banking Sales Analyst
BPI AIA Life Assurance Corporation

- Advise financial management of new assets, investments and tax efficiency methods.
- Analyze financial data to forecast business, industry and economic conditions for informed investment decision-making.
- reached out to existing and prospective customers to promote, upsell, and cross-sell products and services.
- Participate in continuous product development training to maximize sales potential
- Complete large sales to exceed quota and meet company goals
- Manage customer relationships through consultative sales techniques to attain individual sales goals
- Communicate with customers to schedule appointments, track customer satisfaction, and upsell additional services.

February 2012 - January 2022
Customer Service Representative- New Accounts clerk
Metropolitan Bank & Trust Company- Metrobank

- Answer customers' questions, and explain available services such as deposit accounts, bonds, and securities
- Compile information about new accounts, enter account information into computers, and file related forms or other documents
- Refer customers to appropriate bank personnel in order to meet their financial needs
- Interview customers in order to obtain information needed for opening accounts or renting safe-deposit boxes
- Inform customers of procedures for applying for services such as ATM cards, direct deposit of checks, and certificates of deposit
- Investigate and correct errors upon customers' request, according to customer and bank records
- Execute wire transfers of funds
- Issue initial and replacement safe-deposit keys to customers, and admit customers to vaults
- Perform foreign currency transactions and sell traveler's checks
- Schedule repairs for locks on safe-deposit boxes
- Cross selling of bank products (car loans, home loans, investments and insurance)

July 2009 - February 2012
Administrative Assistant Sterling Insurance Company Inc | Makati

- Create and modify documents such as reports, memos, letters using word processing, spreadsheet, database and or other presentation software such as Microsoft Office, and other programs
- Research, price and purchase office furniture, equipment and supplies
- Establishing, maintaining and controlling personnel, employees, recruitment relations records, files, correspondence, reports, and organization charts
- Preparing paperwork needed to create new employee profile and to place new employee on payroll.