Hao Chen

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SUMMARY OF QUALIFICATIONS

- Strong ability to thrive in high-pressure environments and meet tight deadlines.
- Exceptional attention to detail with a track record of producing error-free work.
- Effective communicator with a proven problem-solving ability to convey complex ideas clearly and build strong working relationships.
- Detail-oriented and highly organized, with the ability to manage multiple tasks and priorities.
- Proficient in Microsoft Office Suite, Excel, R, and Stata.
- IFIC licensed, active AIC candidate member (CRA designation)
- Fluent in Mandarin Chinese.

WORK EXPERIENCE

Banking Advisor

RBC Royal Bank, North York [01/2024] – Present

- **Financial Advice:** Provided personalized financial advice. Complete 6-8 scheduled meetings daily to fulfill clients' banking needs and align clients' requests to proper products.
- **Lending Solution:** Processed credit application including residential mortgages and personal loans. Conducted comprehensive financial assessments to determine client needs and eligibility for various loan products. Helped clients to renew mortgage by reviewing cash flows and clients' overall financial picture.
- **Due Diligence:** Ensured compliance with banking regulations and internal policies in all financial activities.
- **Relationship Management:** Conducted regular follow-ups with clients to ensure their financial needs were met and to identify opportunities for additional services.
- **Teamwork:** Worked closely with managers, team members, and partners. Provided timely support to colleagues when needed. Sent high-quality referrals to partners, resulting in an 85% conversion rate.
- **Change Management:** Facilitated successful migration of HSBC Canada and RBC. Supported HSBC-to-RBC migration by providing on-site training and guidance to HSBC staff on RBC systems and processes.

Financial Advisor / Mutual Funds Representative

TD Investment Services, Markham [09/2022] – [01/2024]

- **Sales Skill**: Exceeded YTD volume target by 45%. Sold over $3 millions in Mutual Funds and GICs in a quarter.
- **Product Knowledge**: Educated clients on suitable types of registered account type (RRSP, TFSA, RIF, RESP, FHSA, etc.) to benefit clients in both short and long-term financial goals. Opened and maintained existing Reg / Non-reg accounts.
- **Work Under Pressure**: Handled over 50 inbound calls during peak season with minimized processing error and zero compliance fails.
- **Multi-task**: Efficiently multitask by working on multiple software platforms simultaneously to provide prompt assistance within minimized handling time.
- **Customer Service**: Worked effectively to fulfill customer requests, resulting in 92% satisfaction rate.
- **Problem Solving**: Solved complex issues in a timely manner by identifying root cause and provide solutions.

Financial Service Representative

CIBC Telephone Banking, North York [03/2022] – [09/2022]

Logistic Specialist

Kam's Tire, Kitchener [10/2018] – [03/2022]

EDUCATION

B.A., Honours Economics (Finance Specialization), University of Waterloo, April 2021.

Completed Courses: Econometric Analysis, International Finance, Business Finance, Statistics for Economists, etc.