CHINYERE RACHEAL OBI

PHONE: +2348028526972, **EMAIL:** chichijames25@gmail.com

ADDRESS: New Horizon 1 Lekki Gardens, Lekki phase 1, Lagos, Nigeria.

Personal Profile

I am a highly proactive and tenacious business professional, dedicated to high leadership standards. I have hands on experience in Business Analysis, Strategy Formulation, and Execution, Sales/Marketing, Market Research, Wealth and Portfolio Management. I am a dedicated sales professional, finance, and documentary credit professional. I also possess effective communication and negotiation skills. I can maintain positive relationships across all levels of the organization. I possess sound analytical skills and I'm proficient in the use of various software applications such as Oracle Financials Microsoft word, Microsoft Power point, Microsoft Excel, CRM, ERP. I am seeking new opportunities to contribute significantly towards the productivity and success of a dynamic and growing company through my analytical, sales proposal writing, and business management skills.

EDUCATION

- **University of Lagos Akoka -** B.Sc. (Hons) Human kinetic and Health (Second Class Upper) **Oct 2010 – Nov 2014**
- **APTECH Computer School -** Diploma in Information System Management **June - Dec 2006**

LICENCE

- **SEC Licensed Capital Market Operator**

EXPERIENCE

FAIRMONEY NIGERIA – Role: Team Lead Wealth Management

June 2021 - Present

- Provision of advice to clients and Relationship Managers to meet the clients' desired wealth management and investment objectives and therefore increase the bank's share of the client's wallet.
- Leading and managing a team/unit to meet set target
- Play a key role in liaising with the RMs in discussing clients' wealth management requirements as well as ensure flow of product knowledge.
- Drive the uptake of wealth products in a client centric manner.
- Support Private Banking and Retail Affluent RMs to drive knowledge of wealth products and sales.
- Provide leadership to the Wealth Advisory team to attain growth and profitability targets.
- Drive customer experience through quality advice strategy, products offering, Relationships.
- Provide independent opinion on quality of clients' existing investment portfolio and wealth needs.
- Determine clients' risk appetite, investment preferences and returns expectations by partnering with RMs in client meetings.
- Managing client's investments
- Analyze financial information obtained from clients to determine strategies for meeting clients' financial objectives.
- Manage client portfolios, keeping client plans up to date.
- Prepare or interpret for client's information such as investment performance reports, financial document summaries, or income projections.

DEUTSCHE ASSET MANAGEMENT – Role: Fund &Portfolio Manager **Jan 2021 – May 2021**

- Maintaining new and existing client relationships including informing clients of market conditions, updating them on investments research and economic trends and meeting with them to discuss their portfolio performance and investment objectives.
- Determining acceptable risk levels for clients based on time frames, risk preference, return expectations and market conditions.
- Evaluating the performance of investment portfolios and ensuring compliance with standards provided by regulatory organizations, including conformance with investor disclosures, privacy laws and anti-money laundering requirements and anti-fraud measures.
- Prospecting for new clients.
- Staying up to date with relevant investment, trading news and economic trends.
- Constructing successful investment portfolios informed by market conditions and economic trends
- Managing client's investments
- Ability to discuss investment performance, economic and market trends
- Presentations to clients on financial and tax planning options and opportunities
- Direct consultation with attorneys, accountants, and other advisors on financial, tax and estate planning
- Understand and coordinate income tax planning and work closely with client tax advisors
- Develop an investment policy statement (IPS) with each client based on their goals, objectives, and risk tolerance
- Monitor manager performance versus benchmarks and develops insights for clients regarding key contributors and detractors
- Monitor asset allocation on a quarterly basis relative to policy and goals; evaluates need to rebalance
- Reviews portfolio issues (i.e., taxes, liquidity events, capital calls, etc.) quarterly

ROSABON FINANCIAL SERVICES - Role: Team Lead, Sales/Investment **May 2018– Nov 2020**

- Coaching, inspiring and motivating a sales team
- Supervising the sales team performance
- Hiring and training sales associates
- Ensuring the team meets the sales targets
- Sales training, development, and performance management
- A good understanding of the market dynamics in the respective sector
- Developing sales strategies to guarantee success and growth
- Developing and maintaining customer relationships
- Disciplined use of CRM system, communication, and customer management
- Handling customer complaints and enquiries
- Monitoring random calls for quality assurance
- Forecasting and analyzing sales data
- Treasury/Investment sales
- Regular reporting of KPI's to directors
- Keeping to targets, exceeding targets and managing KPI's
- Supervises and coordinates the daily activities of sales representatives engaged in promoting and selling a product by phone, typically by using a pre-established sales script
- Disciplined use of ERP system.

RENMONEY FINTECH Role: Senior Sales Analyst **Jan 2016 – April 2018**

- Contact potential or existing customers to inform them about a product or service usingscripts
- Answer questions about products or the company
- Ask questions to understand customer requirements and close sales
- Direct prospects to the field sales team when needed
- Enter and update customer information in thedatabase
- Take and process orders in an accurate manner
- Handle grievances to preserve the company's reputation
- Go the "extra mile" to meet sales quota and facilitate future sales
- Keep records of calls and sales and note usefulinformation
- Telemarketing
- Drafting of relevant correspondence document to communicate the Company's position on any transaction concerning new and existing Client's transactions.
- Manage corporate relationship with existing clients updating them on their transaction and the company's projects
- Developing and managing new business and contracts for the company, project summary, emails etc. bi-monthly.

SKILLS

- Extensive proficiency in use of MS-Word, Excel, and PowerPoint Effective Business Writing Skills
- Excellent Presentation Skills
- Excellent communication skills
- Excellent inter-personal relationship skills
- Excellent creative and marketing skills
- Excellent Leadership skills
- Great Team player
- Outstanding in clear communication and negotiation