

OBINNA JOHN OMENIFE

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PERSONAL SUMMARY

A result-driven investment and asset management professional with a proven record of driving financial growth. Expertise in navigating the complex financial market, investment strategies, and portfolio management, enable me to identify lucrative opportunities, devise innovative strategies and implement effective investment policies that maximize returns.

Additionally, a proven track record of building and maintaining client relationship, providing bespoke investment advice, and effectively managing client's portfolios to achieve optimal returns.

Committed to upholding the highest standards of excellence and thriving in the dynamic finance industry. Demonstrating exceptional leadership and management skills, I am poised to deliver impactful results.

PROFESSIONAL EXPERIENCE

CARDINALSTONE

Lagos, Nigeria

An independent, multi-asset investment management firm offering an assortment of financial services to a diverse institutional, high net worth retail clientele base.

Analyst – Investment Advisory

May 2023 – Present

- Actively promoting the firm's products and recommending alternative investment options to increase the Assets under Management (AUM), while also achieving the goal of onboarding new clients.
- Successfully managing and cultivating relationships with clients from varied backgrounds and levels, ensuring customer satisfaction, inclusion, and encouraging repeat business.
- Conduct market research and analysis- evaluating various asset classes, industry trends, and economic indicators- to identify investment opportunities and generate transaction-oriented ideas to support investment decisions.
- Source and interpret financial data, perform risk assessments, and develop investment strategies tailored to meet the client's financial objectives.
- Monitor and evaluate portfolio performance by tracking investment performance against benchmarks, analyzing returns, and assessing the impact of market conditions on portfolio outcome.
- Monitoring market trends and stock movements, providing suggestions for alternative business strategies to capitalize on changing market opportunities.
- Implementing cross-selling and upselling strategies by offering the group's products and services to clients and prospects.
- Expanding the firm's client base by actively prospecting and leveraging both new and established client relationships.

ZENITH BANK PLC

Abuja, Nigeria

A leading tier one bank in Nigeria by market capitalization, shareholder fund and profitability.

Relationship Manager

Jan 2020 – May 2023

- Successfully generated new business through client acquisition, retention, and deposit mobilization.
- Skillfully managed customer portfolios with an impressive annual turnover exceeding 500 million Naira.
- Actively engaged with clients to assess their risk appetite, investment preferences, and long-term financial objectives, to distill relevant information, and structure tailored solutions.
- Provided expertise on financial planning, retirement planning and wealth preservation strategies. Offered insight on tax efficient investment options.
- Offered guidance on portfolio management, asset allocation and investment products by analyzing market trends and making informed recommendations for adjustments and reallocations to maximize returns and minimize risks.
- Prepared financial models, forecasts, and projections to identify opportunities for growth.
- Processed client's personal and retail loans, as well as other credit facilities.
- Maintained a high level of compliance, professionalism, and integrity at the workplace.

FREED TO LEAD INITIATIVE

Lagos, Nigeria

A non-governmental organization focused on social and economic factors for communities.

Finance Officer

May 2018 – Nov 2019

- Managed the organization's financial activities and maintained accurate financial record in compliance with organizational policies and regulatory requirements.
- Managed over 20 million Naira by collaborating with program managers and stakeholders to develop realistic budgets, ensuring funds are allocated appropriately.
- Monitored budget execution, analyzed variances, and provided recommendations to optimize resource utilization and efficiency.
- Prepared financial statements, reports, and grant-related financial documents in accordance with donor requirements and standards.
- Monitored cash inflows and outflows, maintained bank accounts, and processed payments to vendors, employees, and other stakeholders.
- Implemented financial controls, including proper authorization and documentation, to mitigate financial risks and prevent fraud.
- Supported proposal development, budgeting for grants, and financial reporting to donors.
- Performed internal audits, coordinated external audits, and implemented audit recommendations to enhance financial governance and accountability.

NIGERIAN NATIONAL PETROLEUM CORPORATION (NNPC)

Abuja, Nigeria

A dynamic global energy company with businesses and operations across the entire spectrum of the energy value chain.

Finance Intern

July 2016 – Sept 2016

- Prepared spreadsheets for assorted payments of the diverse strategic business units in NNPC at the treasury department.
- Worked closely with professional auditors to reconcile accounts of various strategic business units in the enterprise.
- Assisted in monitoring cash flow, reconciling bank statements, and preparing cash position reports.
- Performed a broad range of administrative task to support and increase efficiency and productivity.
- Participated in various leadership and managerial workshops.
- Learnt and adhered to governmental financial regulations, policies, and procedures. Interacted with professionals and gained exposure to the complexities of treasury functions in a governmental setting.

EDUCATION

KWAME NKRUMAH UNIVERSITY OF SCIENCE AND TECHNOLOGY

Kumasi, Ghana

BSc Economics and Finance Second Class Honors (upper division)

Aug 2013 – Oct 2017

CORE COMPETENCIES

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- Portfolio management, equity trading, and Investment advisory.
 - Financial modeling, reporting, and valuation.
 - Market Research and Analysis
 - Customer relationship management, sales management, and retention.

COMMUNICATION AND INTERPERSONAL SKILLS

- Strong proven written and verbal communication skills.
- Public speaking, decision-making, and presentation skills.
- Excellent sales and negotiating skills.

ADDITIONAL

- Proficient working knowledge of MS Office Suite (word, excel, and PowerPoint).

PROFESSIONAL TRAINING AND CERTIFICATIONS

Associate Chartered Accountant (ACA) in view.

Financial Modelling and Valuation Analyst (FMVA) – Corporate Finance Institute.

Excel Skills for Business – Macquarie University & Coursera (October 2019)

Neuro-Linguistic Programming I – Innocent Minds (June 2019)