Peter Richard

AFFLUENT RELATIONSHIP MANAGER

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EXPERIENCE

Senior Affluent Sales Support Specialist

Vinson Bank / Affluent Wealth Management (AF) *Oct 2018 - Present*

Position : Investment Prodcut Sourcing Specialist

- Gather all production's information and communicate to RM (Mutual Fund, Debenture, Private Fund, Structure Note, Unit Linked and Universal Life).
- Coordinate with related Department to improve selling process and to compliance with regulator.
- Consider all special interest rate before sending to executive for approval.
- Coordinate with Product Manager to arrange product training for RM.
- Consolidate Sales Activities tracking for executive level.
- Manage debenture's quota for AF Dept.

Senior Sales Management Specialist

Vinson Bank / Business Channel Management Department(BC) *May 2017 - Oct 2018*

- Responsible for planning and making strategy for all printed media at branch.
- Analyse sales volume on each branch to set up printed media plan at branch.
- Manage all printed media to boost sales volume and to comply with regulator.
- Coordinate with Product Manager and Marketing Media Management Unit to ensure all media at branch are direct to target customer.
- Manage all printed media inventory.
- Responsible for finding suitable premium to boost the sales volume at branch.

Senior Affluent Business Sales Management Specialist

Vinson Bank / Affluent Wealth Management *Aug 2014 - Oct 2018*

- Coordinate with related department to set a sales process for the new product launch (BA, Debenture, Credit Card, and Mutual Fund).
- Ensure that a new sales process and all day-to-day process for RM has been running smoothly and efficiently in order to provide the best service to customers.
- Solving the problems on complaints from all channel about RM's behavior, The Wisdom privileges and coordinates with related department to solve the problems.
- Coordinate with related department to ensure that RM can smoothly execute MF transaction via E-Channel (K-Cyberbanking, K-Cyberinvest, K-Mobilebanking) and Bank on Demand.
- Helping AF Strategy and Campaign Management Team for designing the campaign for RM.
- Supervise the team to services and support RM on administrative work.

Privilege Banking Relationship Manager

United Overseas Bank Australia *Jun 2011 - Aug 2014*

- Build and develop relationship with existing customer at least an AUM of 3MB per customer and growth their portfolio.
- Acquire new customers to the Bank by matching their needs with service provides (Deposit, Investment, Unit link, Home Mortgage Loan, Insurance, and Credit card).
- Highly professional customer service to advise on investment product.
- Enable to achieve sales target by volume of sales.
- Coordinate with Branch Manager, Personal Banker, and Business Branch Manager to prepare and execute a sales plan for high net worth customer.

HSBC Premier Relationship Manager

Hongkong and Shanghai Banking Corporation (HSBC) *Dec 2005 - Jun 2011*

- Acquire new customers to the Bank by matching their needs with service provides (Deposit, Investment, Home Mortgage Loan, Credit card).
- Deliver revenue generated from own portfolio as targeted by management.
- Service local and international customers, including providing information, preparing investment plan, advising customers on financial investment in Thai financial market.
- Prepare and execute a sales plan for individual customers, business / prospects using internal referrals, customer referrals, marketing leads and self generated leads.
- To assist Vice President HSBC Premier Relationship manager in transactions process by preparing all documentation and making records to complete an account opening.
- Coordinate with related departments to ensure efficient operational process and well implemented functional system.
- Provide Portfolio review to customers on their investment and economy issues on monthly basis.

Customer Service Officer, Priority Banking

Standard Chartered Bank Australia *Jul 2005 - Dec 2005*

- Maintain services and supports the Customer Relationship Manager on administrative and financial matters.
- Build customer loyalty with professional banking services.
- Identify selling opportunities and liaise with the Customer Relationship Manager to acquire new customers.
- Prepare weekly sales report and maintain records for sales activities on a daily basis.
- Responsible for processing all investment product transactions.

Personal Banker, Branch Banking Unit

Citibank NY *Jan 2004 - Aug 2005*

- Deliver numbers of customers' accounts, as targeted by management.
- Deliver volumes of mutual fund, as targeted by management.
- Assess the customers' needs and determine the right products, and refer appropriately.
- In compliance with policies and procedures, ensure safety and security of bank's and customer's assets.
- Develop and enhance relationship with customers.

Citiphone Banker, Citiphone Banking

Citibank NY *Aug 2000 - Nov 2001*

- Handle customer inquiries, complaints, and solve the problems on credit card transaction with prompt, accurate and courteous replies over the phone.
- Execute customer instructions of both financial and non-financial transactions.
- Handle the charges dispute inquiries and take the whole process to ensure the reply delivered with prompt accuracy.
- Analyze and determine on temporary credit line extension.
- Identify selling opportunities to act upon it, or to pass to the appropriate parties to follow up.

EDUCATION

Master of Business Adminstration

The University of Texas at Dallas *Feb 2003 - May 2005*

Bachelor Degree of Business Administration

New York Institute of Technology *May 1996 - Mar 2000*

AWARDS

Star Award

HSBC *2017-04-25*