

XIAOLIN SONG

Calgary, Alberta

PROFESSIONAL PROFILE

- 6 years' experience in financial services with extensive experience in customer relationship management.
- Solid knowledge in investment analysis, retirement planning and financial management. A CFP® (Certified Financial Planner) professional (Granted by FPSB China council).
- Consistently accomplished sales targets and increased assets by approximately 20% annually in my role as Financial Advisor.
- Advanced proficiency in using bank software system (Panda, EBBS, IRM, Iflow, etc.), Financial Calculators and Microsoft Office Suite (Word, Excel, PowerPoint and Outlook).
- Ability to speak read and write in English, Mandarin.

WORK EXPERIENCE

Financial Advisor

2013-2015

Standard Chartered Bank, Jiangsu Suzhou Branch, China (<http://www.sc.com/cn/en>)

- Analyzed clients' financial records, set goals and developed a financial strategy.
- Provided advice to clients during the process of implementing their financial plan to help them achieve their goals.
- Delivered proper asset allocation, suitability assessments and other available tools to meet client needs.
- Acquired new customers (6 new clients on average per month) through marketing and promotional activities.
- Monitored client portfolios to ensure quality and profitability.
- Enhanced client relationships by introducing the benefits of bank products (Credit Cards, Saving Accounts, Mortgages, Structured Notes, Bonds, Mutual Funds, etc.) and expanding existing customers' portfolio holdings.
- Assisted clients with digital banking including mobile, ATM, and online banking.

Account Manager

2012-2013

Bancassurance Department, AIA Group Limited Jiangsu Provincial Branch, China

- Answered enquiries and provide information on insurance products, policies and services.
- Distributed product booklets and supplied product training services to partner banks.
- Collected and examined the latest updates/information regarding the prevailing market trends, competitor rates; Prepared customer survey results, feedback reports and submitted to management team.

Customer Relationship Manager
SIP Science & Technology Development Co., Ltd, China

2009-2011

- Provided investment consulting services on investment policies and office selection assistance; Worked closely with investors to start up their business by using external resources such as business registration, HR services and financial services.
- Assisted companies with the application process for national/provincial innovation fund.
- Collected and analyzed customer feedback, and used data to optimize management procedures, for example parking lot expansion, extending canteen service hours, etc.
- Collected information of high-tech industries mainly in software, integrated circuit design, environmental protection, and service outsourcing industries; prepared industry reports in required fields for strategy making.

Office Administration
Kopenhagen Fur, Denmark

2006-2008

- Provided day-to-day office and administration duties, and assisted Chinese clients in their communication with agencies.
- Tracked auction procedures, provided price confirmation, issued invoices and relevant auction information to clients.
- Collected customer feedback for service improvement.

EDUCATION BACKGROUND

Bachelor of Information Management & System
Wuhan University, China (<http://en.whu.edu.cn>)

2000-2004

Exchange student in University of Southern Denmark (www.sdu.dk/en)

2004-2005

Relevant courses: Advanced Mathematics, Probability Theory and Mathematical Statistics, Economics, Financial Management, Information Management, Information Analysis and Prediction, Fundamentals of Management, Accounting Theories, Marketing, Reconstruction of Enterprise, Project Management, etc.

QUALIFICATIONS AND TRAINING

Canadian Securities Course (CSC®), IFSE, Canada (https://www.csi.ca)	on going
Corporate Readiness Training Program (CRTP), Bow Valley College, Calgary	on going
Certified Financial Planner (CFP), FPSB China Council (https://www.fpsb.org)	2016
Associate Financial Planner (AFP), FPSB China (http://pro.fpsbchina.cn)	2015
Securities Qualification Certificate, SAC (http://www.sac.net.cn/en)	2013
Insurance Qualification Certificate, CIRC (http://www.circ.gov.cn)	2012