

Mohamed Abd El-Rahman Ibrahim

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Dubai, UAE

Banking | Accounting | Customer Relationships Management (CRM) | Financial Management | Operational Management |
Customer Service Management | Sales | Cash Management

Summary

An accomplished and Skilled Multicultural Platinum Department Supervisor with more than 7 years of experience in the banking sector, with wide expertise in portfolio monitoring, data analysis, investment management, wealth management, sales, cash management, and relationship management. Through them, provide financial advice to clients to help them attain their business or personal objectives. as well as identify client needs, assess client financial situation, develop financial strategies, develop and present financial plans, help clients to make decisions, reach out to prospective clients, and maintaining client databases assets like financial planning and strategy in several countries and ensured implementation with the highest quality. Looking to obtain a challenging position in a fast-paced environment to utilize my expertise in providing guidance and advice to advance the level of the organization and achieve its goals.

Skills

- High Net Worth (HNW) Clients
- Wealth Management
- Personalized Financial Solutions
- Investment Advisory
- Portfolio Management
- Client Relationship Building
- Financial Planning
- Asset Allocation
- Risk Management
- Wealth Preservation
- Retirement Planning
- Financial Advising
- Trust Services
- Cross-Selling
- Customer Retention
- Compliance
- Sales Management
- Cash Management
- Investment Products
- Market Research
- Investment Strategies
- Financial Analysis
- Client Satisfaction
- Upselling Financial Services
- Effective communication
- Leadership
- Time Management
- Attention to detail

Professional Experience

Platinum Department Supervisor

National Bank of Egypt (NBE) | Feb 2022 – Present

Achievements:

- Successfully boosted the acquisition of new clients from the affluent segment through strategic marketing initiatives and referral programs.

Value Added:

- Demonstrated the bank's products and services effectively to attract fresh clientele from the affluent segment.
- Effectively led and guided a team of branch relationship managers, supporting them in customer relationship management.
- Conducted informative seminars for branch employees to enhance their knowledge of retail products and industry trends.
- Cultivated a network of platinum customers, establishing connections and fostering mutually beneficial relationships.
- Ensured prompt follow-ups and seamless coordination with different departments and senior management.

Platinum Relationship Manager (RM)

National Bank of Egypt (NBE) | Feb 2020 - Feb 2022

Key Achievements:

- Proficiently analyzed the financial requirements of affluent clients and delivered customized solutions to meet their needs effectively.
- Accurately assessed clients' risk aversion levels, enabling the provision of appropriate and tailored product recommendations.

Value Added:

- Conducted thorough financial analyses for affluent clients, identifying their unique needs and objectives.
- Assessed clients' risk tolerance to determine suitable investment options and develop appropriate financial strategies.
- Nurtured long-term relationships with customers, offering personalized advice and guidance on wealth accumulation.
- Effectively promoted the institution's products and services to clients, ensuring alignment with their financial goals and objectives.

Customer Service Officer

National Bank of Egypt (NBE) | Dec 2018 - Feb 2020

Key Achievements:

- Demonstrated a commitment to delivering outstanding customer service, resulting in consistently high satisfaction scores and positive feedback from clients.
- Successfully streamlined account management processes, leading to reduced response times and increased overall efficiency.

Value Added:

- Responded promptly to customer inquiries, offering assistance on various account types, banking products, and services.
- Efficiently managed administrative tasks to ensure the accuracy and integrity of customer account information.
- Collaborated effectively with team members to identify areas of improvement in customer service processes and procedures, contributing to enhanced service delivery.

Bank Teller - Head Teller Assistant

National Bank of Egypt (NBE) | Egypt | Feb 2017 - Dec 2018

Key Achievements:

- Ensured precise cash drawer management and conducted essential reconciliations, adhering to bank operations and security protocols.

Value Added:

- Proficiently processed a variety of customer transactions, such as deposits, loan payments, check cashing, and issuing cashier's checks.
- Successfully cross-sold bank products and services by identifying customer needs and making relevant recommendations.
- Skillfully reconciled the cash drawer, guaranteeing accurate cash transactions and consistently maintaining an adequate supply of currency.

General Financial Officer

BIT Trans (Bus Transportation Company, Private) | Jan 2014 - Feb 2017

Value Added:

- Provided comprehensive oversight of branch operations, encompassing financial management, human resources, and customer service.
- Devised and implemented effective business strategies, successfully driving the company towards its goals and objectives.
- Effectively managed and led a team of 12 employees, offering guidance, coaching, and conducting performance evaluations.
- Maintained open and productive communication with stakeholders, including customers, suppliers, and regulatory authorities.
- Proactively monitored market trends and competitors, making essential adjustments to maintain a competitive edge in the industry.

Education

- **Bachelor's Degree in Accounting** | Faculty of Commerce - English Section, Mansoura University | 2016

Courses & Certificates

- **CWP (Certified Wealth Practitioner)** | Moody's, Cairo | Jan 2023
- **Customer Segmentation** | National Bank of Egypt (NBE) | Sep 2022
- **Operational Risk Management Policies** | National Bank of Egypt (NBE) | Sep 2022
- **Competencies Framework** | E-learning | May 2022
- **Consumer Rights Protection** | National Bank of Egypt (NBE) | May 2022
- **Small and Medium Enterprises** | E-learning | May 2022
- **Coaching Skills** | National Bank of Egypt (NBE) | Mar 2022
- **Negotiation Skills** | National Bank of Egypt (NBE) | Dec 2020
- **Accounts Confidentiality** | National Bank of Egypt (NBE) | Jul 2020
- **Know Your Customer Rules** | National Bank of Egypt (NBE) | Mar 2020
- **FATCA** | National Bank of Egypt (NBE) | Jan 2020
- **Introduction For Banking** | National Bank of Egypt (NBE) | Dec 2019
- **Reporting Illegal** | National Bank of Egypt (NBE) | Nov 2019
- **Anti Money** | National Bank of Egypt (NBE) | Apr 2019
- **Pci Dss** | National Bank of Egypt (NBE) | Mar 2019
- **Essentis App** | National Bank of Egypt (NBE) | Jan 2019
- **Operation Risk for Tellers** | National Bank of Egypt (NBE) | Jun 2018
- **Anti-Fraud & Counterfeiting** | National Bank of Egypt (NBE) | Mar 2018
- **Cheques Anti-Fraud** | National Bank of Egypt (NBE) | Dec 2017
- **Information Security Awareness Sessions** | National Bank of Egypt (NBE) Issued Nov 2017 Issued Nov 2017
- **Principles of Banking** | Egyptian Banking Institute | May 2017
- **Human Development Course** | National Bank of Egypt (NBE) | Feb 2017
- **Universal Tellers for New Comers** | National Bank of Egypt (NBE) | Feb 2017
- **English Conversation** | Harvest Park Educational Center | May 2016

Languages

- **Arabic:** Mother Tongue
- **English:** Excellent