

Mohamed Abd El-Rahman Ibrahim

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Dubai, UAE

Banking | General Accounting | Customer Service Management | Cash Management "Teller" | Customer Relationships Management (CRM) Operational Management | Sales Management

Summary

An accomplished and Skilled Multicultural Wealth Department Supervisor with more than 7 years of experience in the banking sector, with wide expertise in General Accounting, customer service, cash management, investment management, wealth management, sales, and relationship management. Through them as a banker, provide financial advice to clients. as well as upselling and cross-selling of bank's retail products, teller responsibilities of accurate and safe handling of routine bank transactions, also as general accountant, processing tax payment and returns, reconcile accounts payable and receivable. 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
- General Accounting
- Customer Service
- Cash handling and mathematics
- Client Relationship Building
- Financial Planning
- Computer knowledge
- Risk Management
- Problem-solving
- Attention to detail
- Financial Advising
- Trust Services
- Cross-Selling
- Customer Retention
- Compliance
- Sales Management
- Cash and Treasury Management
- Investment Products
- Market Research
- Critical Thinking
- Continual learning
- Financial Statement Preparation
- Upselling Financial Services
- Effective communication
- Leadership
- Time Management
- IFRS Knowledge
- Work Independently
- Data Entry & Accounting Software

Professional Experience

Platinum Department Supervisor

National Bank of Egypt (NBE) | Feb 2022 – Jul 2023

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.

Universal Teller - Head Teller Assistant

National Bank of Egypt (NBE) | 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 Accountant

BIT Trans (Transportation & Logistics Company) | Part-time | Jun 2016 - Feb 2020

Value Added:

- Manage all accounting transactions, handle monthly, quarterly, and annual closings, compute taxes, and prepare tax returns.
- Comply with financial policies and regulations, report on company's financial health and liquidity, and prepare budget forecasts.
- Maintain customer confidence and protect operations by keeping financial information confidential.
- Summarize current financial status by collecting information, preparing balance sheet, profit and loss statement, and other reports.
- Manage accounts payable and receivable, including collecting payments and identifying potential risks of non-payment.

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 Practices** | 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) | 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