

FOUNDER AND PROJECT MANAGER

Summary

A result-driven, client-centric, and committed Client Services Officer with over seven years of experience in the financial services industry. Bringing expertise, enthusiasm, and passion to serve above and beyond client's needs, build relationships, and maximize potential profitability and productivity.

Highlights

- *Client Services Management
- *Asset-Backed Securities
- *Portfolio Management
- *Insurance
- *Project Management
- *Cash & Collateral Management
- *Securitization
- *General Accounting and Taxation
- *Corporate Trust
- *Strong interpersonal and collaborative skill
- *Compliance
- *Microsoft Office with advanced Excel skills

Accomplishments

- Created raving-fan clients through meticulously maintaining superior provision of excellent client services at all times while serving as a Client Service Officer at Deutsche Bank
- Achieved high satisfaction from top-tier clients and management for the administration of high-volume trust portfolios expanding department's branding and capacity while working as a Financial Analyst at American International Group
- Increased the manageability for more than 500 collateral trust accounts at American International Group

Experience

Founder and project manager

October 2012 to June 2015 Company Name

- Directed and coordinated activities to build an online platform for Vietnam's SMEs and companies
- Fostered communication internationally with team members on project targets, achievements, and improvements
- Researched Vietnamese market to assess risk and opportunity to help develop and implement objectives

Client Service Officer, Associate

February 2007 to October 2012 Company Name - City , State

- Served as a primary contact for clients; and liaised with manager, trading desk, operations, custodians, and other related third-parties on a daily basis
- Produced daily report for collateral portfolios totaling over \$1.7B utilizing Bloomberg and other in-house systems; and reported them timely and consistently to top-tier clients and upper management
- Managed monthly and quarterly P&I distribution for \$10B of Asset-Backed Securities; served and executed daily administrative and transactional activities on behalf of the client as the primary Trustee; optimized daily investment in accordance with client's direction through an array of permissible short-term and longer-term instruments such as Commercial Paper, Time Deposits, Treasury Notes, Mutual Fund, and others financial products
- Received 100% client satisfaction rate and achieved all repeated businesses for 5 consecutive years
- Successfully administered and serviced a brand-new securitized product resulted in an expansion of department's capacity, visibility, and profit during a period of global economic and financial instability
- Ensured that certifications and reports are received timely and complied with regulatory requirements set forth in the Trust Agreements and/or other governing Legal Agreements
- Diligently monitored and ensured that account transactions were clear of red flags for fraud, embezzlement, money laundering, false accounting statements, organized crime, and terrorist financing
- Reviewed and involved in discussions of Legal Agreements, corporate trust insights, Dodd-Frank Act, SEC regulations and banking regulations with internal departments, other major banks and institutions
- Applied leadership skills through active participation in numerous projects for various system enhancements, cross-business connectivity, innovate services, and overall productivity and efficiency
- Involved with but not limited to account analysis, reconciliation, and Know Your Customer process

Financial Analyst

February 2004 to January 2006 Company Name - City , State

- Managed more than 100 corporate trust portfolios with a combined market value in excess of \$15B and consisted of an eclectic variety of financial instruments
- Effectively administered and reported daily large trust funds for Morgan Stanley, Exxon Mobil Corporation, and Harvard and consistently received high satisfaction from clients and upper management
- Increased productivity and manageability for 700 collateral accounts through reorganization and restructure

- Coordinated, reviewed, and reconciled 30 high-profile cash collateral accounts and delivered before deadline
- Diligently reviewed assigned accounts for compliance with all reporting requirements.
- Recommended innovative alternatives to generate revenue and reduce unnecessary costs
- Achieved revenue growth for our department by taking on 10 additional reinsurance collateral accounts

Education

B.S : Finance , 2004 Rutgers University, Rutgers Business School - State

Finance Certified Corporate Trust Specialist, American Bankers Association, New York 2011

Professional Affiliations

Women On Wall Street, Princeton in Asia, local charities in Vietnam, Member Since 2007

Business English for Professionals and Entrepreneurs, Founder Since 2015

Vietnam Entrepreneurs of Today and Tomorrow Network, Founder Since 2014

Related Strengths

â€¢ Excellence client orientation

â€¢ Work well in a high paced and high pressure environment

â€¢ Strong problem solving and creative thinking

â€¢ Technically savvy