

Główne umiejętności

Sales

Product Management

English

Certifications

EFA EFPA

Independent, Certified (EFA EFPA) Financial Planner at EFPA Polska

Warszawa, Woj. Mazowieckie, Polska

Podsumowanie

Licensed financial advisor EFA EFPA. Associated with the financial advisory sector since 2006. Specialist in real estate, mortgages and investment products. HNWI investment planner.

Doświadczenie

EFPA Polska

Certified (EFA EFPA) Financial Planner

maj 2015 - Present (9 lat 4 mies.)

Poland

Planner Experienced and driven Financial Advisor with over ten years of experience providing clients with optimal assistance with retirement planning, estate planning, investment advice, tax strategies, and overall support managing their finances. Proven track record of competitive market share expansion and assisting corporations in reaching goals. Driven and detail-oriented with the ability to thrive in high pressure environments. Adept at developing key relationships and furthering business development.

- Giving comprehensive, goal-based advice to clients from all demographic groups to help them match their needs and aspirations in the medium to long term
- Advising on all aspects of real estate transactions and investments
- In-depth analysis of investment opportunities in the financial and real estate markets, including tax and legal aspects, as well as the safety and attractiveness of investments

Expander Advisors sp. z o.o.

Mortgage Broker in Expander / AVIVA Group

wrzesień 2014 - Present (10 lat)

- Analyze clients' financial situation and research appropriate loan solutions and providers.

- Prepared clients' applications for loan processing and explained all legal aspects of loan, including payment terms and conditions
- Collaborated and maintained business relations with banks, insurance companies, and specialized financial institutions

Open Finance SA

6 lat 2 mies.

Financial Expert

lipiec 2008 - sierpień 2014 (6 lat 2 mies.)

Warsaw, Mazowieckie, Poland

- Analyzed customer's income, assets, investments, and debt related information.
- Facilitated entire loan and real estate purchase process for the customer and ensured compliance to rules and regulations.
- Promoted and sold financial and wealth management services and products to clients.
- Developed new clients and ensured continuous business from them.
- Direct management of two sales groups in two cities.

Project Manager, Sales network manager

marzec 2012 - grudzień 2013 (1 rok 10 mies.)

Warsaw, Mazowieckie, Poland

- Branding and development of the sales network of the company.
- Consultancy in creating of jobs and career paths, salary scales, training.
- Coordinating and supervise the day-to-day operations of ongoing projects to ensure smooth work and productivity

Wykształcenie

Warszawski Instytut Bankowości

Finance and Financial Management Services · (2014 - 2015)

Technologiko Ekpaideutiko Idrima, Kavalas, Greece

Akademia Techniczno-Humanistyczna w Bielsku-Białej

Master's degree, Business, Management, Marketing, and Related Support Services · (2004 - 2009)