

Brandon De La Rosa

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I am a finance professional with experience in retail banking, credit operations, and sales, specializing in credit risk analysis and client relationship management. My work within an FCA-registered organization has given me valuable insight into UK regulatory standards. I am actively enhancing my expertise through CPD courses in UK Financial Regulations, Investments, Risk, and Taxation to prepare for managing client portfolios and delivering tailored financial solutions.

EDUCATION

WORK EXPERIENCE

13/05/2024 - 05/08/2024

Funding Operations Specialist [Youlend]

- Reported to the Funding Team Lead as one of 12 Funding Specialists and was responsible for conducting quality assurance reviews to ensure accuracy and compliance in all credit applications processed by the Sales, Credit Decisions, and Loan Closing departments.
- Processed 250 credit applications weekly with an under 2% error rate target (attained a 0.0% rate on week 6).
- Utilized HubSpot to process all credit applications using automated workflows.

01/11/2020 - 01/01/2022

Financial Advisor/ Insurance Agent [Sagicor Life Inc.]

?Reported to the Branch Manager as one of 20+ Financial Advisors and was responsible for educating local and international clients on insurance and financial products.

?Ensured compliance with financial regulations, including Anti Money Laundering (AML) and Know Your Customer (KYC) protocols, maintaining high standards in client interactions and recommendations

?Achieved 8% to 15% quarterly increases in sales revenue through effective promotion and sales strategies.

01/03/2019 - 31/08/2020

Personal Banking Officer [Scotiabank]

- Analysed clients' financial positions to assess credit eligibility, recommend products, and mitigate risks. •Cross-sold banking products, exceeding sales targets by 137%-150% each quarter. •Tracked market trends and competitor offerings to enhance service delivery. •Adhered strictly to regulatory compliance and banking protocols. •Mentored junior team members, fostering a high-performing team environment.

12/06/2017 - 01/03/2019

Head Teller / Remittance Teller [Scotiabank]

Scotiabank is one of Canada's largest and most international banks with 90,000+ employees and £18B+ in annual revenue.

? Reported to the Teller Supervisor and Assistant Manager as the Head Teller/Remittance Teller leading a team of 14 Tellers: surpassed referral targets by over 232% while maintaining a 75% close ratio.

? Onboarded and supported 8 new starters, maintained ATMs, and ensured compliance with banking regulations, KYC, and AML protocols

CERTIFICATES

SKILLS

Hard Skills:

Soft Skills: