# Objective

I am a *Business Commerce (Management and Marketing)* graduate, also holding a *Diploma in Financial Planning(RG146)*, with 6+ years of professional experience in areas such as Wealth Management, Financial Advice/Planning, Project Management, Sales and Service, and 3+ years in the Social/Environmental Enterprise and Sustainability space.

# Work Experience

# Deloitte Managed Solutions – Case Assessor

# Contractor : Full-time

## October 2021 –May 2022

* Assessed insurance and financial advice documents for compliance, between external companies and their clients.
* Objectively assessed for potential detriment that may have been caused when financial products were served to clients.
* Met and exceeded expected quality markers and other KPIs, and maintained stellar relationships with working teams and managers

# Social Enterprise Lanka – Operations Manager (Sri Lanka)

# Permanent: Full-time

## March 2017 – June 2019

* Directed a leading social enterprise in Sri Lanka that focused primarily on capacity-building for new, aspiring and existing social entrepreneurs and NGOs around the country.
* Carried out nation-wide training programs in public forums, universities and individual enterprises/entrepreneurs.
* Pioneered and rolled out Sri Lanka’s ( and the world’s) first TV program (‘Ath Pavura’), to provide a platform for social impactors to meet and impact investors. Sri Lanka’s first ever Social Impact Fund was created in partnership with Lanka Impact Investing Network (LIIN).
* Provided support and education to social entrepreneurs who were attempting to address social and environmental issues in areas such as Waste, Education, Organic Farming, Health, Reconciliation etc.
* Mediated partnerships between grass-root enterprises and private-sector, and also with international Social Enterprises and NGOs.

# Commonwealth Bank Financial Planning – Servicing Planner

# Permanent: Full-time

## November 2015 – March 2017

* Responsible for vetting and interviewing clients with financial advice needs that are referred through the Commonwealth branch system.
* Built and maintained successful relationships with all aligned financial planners and assisted them with tasks and duties such as reviewing advice documents, organising appointments, completing product research and applications, liaising with external product providers and implementing advice.
* Consistently met and exceeded team and personal KPIs which includes metrics such as meetings booked, quality first appointments, timely completion of workflow tasks , turnaround time with assigned duties (research and advice reviews) etc.
* Responsible for providing training and feedback to the branch staff while maintaining positive branch-hub relationships.

# ANZ – Wealth Specialist (Superannuation & Insurance)

# Temporary contract work: Full-time

## March 2015 – September 2015

* Responsible for providing general advice around ANZ superannuation and Insurance products whilst up-suggesting and cross-suggesting other wealth products.
* Managed exisiting ANZ client needs around superannuation, personal insurance and Financial Advice.
* Assisted customers with investments and Insurances within their retail superfunds. Also provide customers with clear fee breakdowns and market comparisons.
* As per KPIs, was ranked top specialist every month during my tenure of 6 months where performance measures were met and exceeded (120%-140%)
* Was nominated to participate as 1 of the 3 specialists as part of ‘Team-Elite’ incentive program of 2015, which is held quarterly to reward specialist that showcase top work performance and behaviours.
* Worked closely with a team of Financial Planners, providing support with daily referrals and managing other client/business needs.
* Was appointed ‘Team Objection Handling Coach’ due to my professional and effective negotiation and problem solving skills portrayed during customer interactions.
* Frequently received customer commendations and positive feedback from front line management for support provided to customers and other team members.

**Volunteer and other work experience   
  
IWF STAFF and Sidekicker– General Labour**

## June 2019– September 2021

* Effective completion of labour jobs within the Horticulture industry (plant handling and factory hand), with leading employers such as Tesselaar and Oasis Horticulture.
* Effectively completed casual manual labouring jobs (warehouse jobs, factory jobs , pick packing etc) at various company locations around south-east Melbourne.
* Remained flexible and open to take on any and all day-to-day and last minute shifts.
* Demonstrated high productivity, efficiency and attention to detail during all tasks, while abiding by all required safety and performance standards.

# Jawun Secondment Program – Skilled Volunteer (Commonwealth Bank of Australia)

## August - September 2016

* Completed a 6-week secondment with Jawun working with a community child care centre in La Perouse; Gujaga Child care centre.
* Helped create sustainable relationships between indigenous enterprises/ community members and local enterprises and institutions.
* Provided support to the admin and managerial staff by reviewing the centre’s current financial structure and identifying any potential improvements to their bottom line and operational budget .
* Worked alongside admin and kitchen staff also assisting with the children’s nutritional/food plans and liaising with food suppliers to make sure positive and exclusive relationships are maintained.
* Successfully introduced efficient business practices and processes for the centre to adapt in order to increase its productivity and efficiency.

# Education

## Higher Education (Tertiary and other)

**Diploma of Financial Planning (RG146) – Integrity Education Group**

## June 2015 – September 2015

* All modules completed (Generic, Risk, Investment Planning and Superannuation).
* Received a ‘competent’ grading for all 4 units.

**Bachelor of Commerce (Marketing and Management) – Swinburne University of Technology**

## 2010 - 2014

* Graduated in 2014 with a ‘Distinction’ average.
* Completed first year at Royal Melbourne Institution of Technology (RMIT) prior to transferring to Swinburne.
* St. Joseph’s College, Sri Lanka – Completed up to year 10

**Achievements and Skills**

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| Achievements | * Recipient of High Flyer Top sales person award at Westpac (Aegis Global) Melbourne – 2011 * Received a Golden Key certificate for being amongst the top result holders at Swinburne University. * ‘Excellence in Economics’ award – VCE year 12 (Westall Secondary) | |
| Skills/Abilities | * High proficiency in project management * Sustainable citizen and thinker * Iyengar Medical Yoga Practitioner * Creative writer and Spoken Word Poet * Basketball Player and Cricketer (school level) * High computer literacy (MS office) and excellent Key Board Skills * Great customer service and sales abilities and track record * Member of the Swinburne University Basketball Club * WHITE CARD holder * **References available on request** | |
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