

# Jean-Paul Ballane

## Relationship Manager

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Lebanon - Beirut

**Delivered above yearly target** 150%-200% consecutively for the past 7 years and achieved 3rd place sales in the new product campaign (credit cards & online services) among all bank branches.

**Solid banking and client relationship experience** with 11 years of total experience in the banking sector and 5 years as a Relationship Manager

**Orchestrating successfully between tasks** that range from client building, financial planning processes, portfolio management, strategic selling, problem resolution, leadership, and teamwork

## PROFESSIONAL EXPERIENCE

### Relationship Manager

Bank Audi SAL, Lebanon, October 2015 - Present

Duties include:

- Maximize revenue by approaching prospects & attracting new clients through referrals, network, contacts, and the bank's database
- Growth deposit and loans portfolios, acquire affluent & SME clients & approach companies for payroll acquisition
- Build, develop, acquire, and maintain long-term relationships with clients while adopting a client-centric approach
- Conduct KYC reviews and risk assessments
- Experience & wide knowledge in trading Forex & CFD's
- Maintain constant contact with clients & follow up to build client loyalty and ensure complete satisfaction
- Handle the opening, management & follow-up of portfolio accounts
- Prevent client attrition by closely monitoring account's movement & maturities, loans' maturities, early settlements, products' and services' cancellations and achieve yearly sales targets

## SKILLS

Strategic Selling  
Financial Planning and Advisory  
Wealth Management  
Sales Expertise  
Problem Management  
Interpersonal Communication  
Management and Leadership  
Risk Management  
Relationship Building  
Client Relationship Management  
Time Management  
Portfolio Management

## CERTIFICATIONS

**International Introduction to Investment Award**, ESA Business School, 2015

**Lebanese Financial Regulation**, ESA Business School, 2013

**Legal Aspects of Banking Operation**, ESA Business School, 2012

## EDUCATION

**MBA in Banking and Finance**, University La Sagesse, 2015

**BS in Business Administration**, University La Sagesse, 2011

- Act as an intermediary between the Front Office, Treasury & Capital Markets, & Clients in the sale and purchase of securities
- Participate in events & social activities to increase social networking capabilities

## Customer Service Officer

Bank Audi SAL, Lebanon, October 2011 - September 2015

Duties include:

- Provide excellent client care, drive sales, and provide timely and effective solutions to clients (sales management)
- Identify client needs and refer clients to appropriate banking services and products
- Manage accounts and provide loans to clients while discussing their financial situation (commercial banking)
- Handle retail and sales operations
- Collect client feedback and process changes to exceed client satisfaction goals
- Continuously update skills by participating in professional trainings and contribute the acquired knowledge to the development of the bank
- Led a seminar in "Introduction to banking" for school students career orientation program

## Teller

Bank Audi SAL, Lebanon, January 2010 - September 2011

Duties include:

- Provide high-level client service through a friendly approach, strong professionalism, and timely assistance with client transactions
- Prepare client and ATM cash rapidly and efficiently
- Order new checks, stop payments, investigate identity theft
- Identify sales opportunities and refer clients to branch partners in financial services
- Complete highly accurate, high volume money counts via both manual and machine-driven approaches

## LANGUAGES

Fluent in Arabic  
Fluent in English  
Fluent in French  
Fair in Italian

## SOFTWARE

Microsoft Office  
Oracle FlexCube  
Oracle CRM  
QilkView by Qilk Q  
Bankmate  
Photoshop

## HOBBIES

Basketball  
Football  
Swimming  
Cycling  
Following up on all sports news

## AFFILIATIONS

Member of the Lebanese Scout at  
Sagesse Jdeideh for 11 years