



Mohamed Adel Khalifa

International Certificate in Wealth and Investment Management, CISI

Objective: Seeking a career opportunity within the field of Banking and Financial Services which will challenge my ability to make effective decisions Leading to efficiency in growth and profitability of the organization.

Career History:

Company Name:	Mashreq Bank- Abu Dhabi Branch	Designation:	Relationship Manager
Department:	Insurance Products		
Starting Date:	February 2020	Ending Date:	Current

Role:

1. Develop, manage and maintain long-term full service relationships with clients
2. Manage insurance business with partner insurance companies as a single point of contact
3. Identify and evaluate specific new profitable opportunities
4. Managing the telesales team and assisting junior staff
5. Identify products to offer to clients
6. Train, guide, direct and support a team of employees on day to day activities
7. Frequently contacting clients and finding ways to capitalize on the close relationship with the clients to take advantage of cross-selling opportunities
8. Oversee the product development life cycle of insurance
9. Support product strategies, product revamp
10. Advise the clients on financial services
11. Drive market intelligence and market research. Explore and develop opportunities in new channels to increase penetration of insurance

Achievement: Signed contract with insurance partners diversifying the insurance products' portfolio and drive team to sell the insurance products increasing the business and bank revenue

Company Name:	First Abu Dhabi Bank-Abu Dhabi Branch	Designation:	Relationship Manager
Department	Products and Business Development-Insurance Products		
Starting Date:	October 2014		
Role:	1.Develop, manage and maintain long-term full service relationships with clients 2.Ensure high quality customer services and handle customer complaints and solving problems 3.Good quality, timely and proactive services to all clients. 4.Meet the revenue targets 5.Establishing meeting with customers for creating awareness of products and their benefits and to keep updating their profiles 6.Assist in handling products launches 7.Identify products to offer to clients . 8.Understand the client's profile, requirements and basis 9.Using different social media to help generate more customers and increase conversion opportunities. 10.Meet the target and file reports to outline the number of policies		

Company Name:	Bright Trading Abu Dhabi Branch	Designation:	Sales Manager
Starting Date:	June 2011	Ending Date:	June 2013
Role:	1.Improving overall quality of work through training, guiding and motivating the team 2.Monitoring day to day activities, implementing new ideas to improve the sales process 3.Suggesting new sales campaigns that create a challenging environment	Reason for Leaving:	Returning to banking field

Company Name:	Ajman Bank Abu Dhabi Branch	Designation:	Relationship Manager
Department:	Private Banking		
Starting Date:	August 2010	Ending Date:	February 2011
Role:	1.Increase the Private Banking portfolio 2.Target new customers for investment products 3.Cross-sell other products and services to Private Banking customers and maintain regular contact with them 4.Develop, manage and maintain long-term full service relationships with high income/net worth private banking clients	Reason for Leaving:	Better opportunity

5. Provide advice risk weighted investment and wealth solutions to meet the financial needs of clients
6. Build connections with clients and sell the bank's products and services
7. Share responsibility for soliciting, developing, managing and retaining client relationship for wealth management

Company Name:	Dubai Islamic Bank Abu Dhabi Main Branch	Designation:	Assistant Relationship Manager
Department:	Wealth Management – Investment and Private Banking		
Starting Date:	August 2008	Ending Date:	August 2010
Role:	1. Deliver the budgeted volumes for deposits and sale of Investment Products 2. Increase the Private Banking portfolio by increasing deposits of existing customers 3. Target new customers for the Investment Products 4. Cross-sell other products and services to private banking customers, maintain regular contact with them and ensure their retention	Reason for Leaving:	Better opportunity

Company Name:	Dubai Islamic Bank Abu Dhabi Main Branch	Designation:	Investment Officer
Department:	Wealth Management -Investment		
Starting Date:	February 2008	Ending Date:	
Role:	1. Support clients with all information and advice they need regarding their investment 2. Achieve strategic targets on the investment sales 3. Open new client accounts 4. Support customers in solving problems to ensure customer satisfaction 5. Sell various Islamic Investment Products	Reason for Leaving:	

Company Mashreq Bank U.A.E.
Name:

Designation: Team
Leader

Starting May 2007
Date:

Ending January 2008
Date:

Role: 1. Manage a team of 25 (1 Assistant team leader, 4 Senior Relationship officers, 5 Relationship officers, 14 Sales Officers)
2. Improve overall quality of work through training, guiding and motivating the team monitoring the day to day activities, implementing new ideas that improve the sales process
3. Suggest new sales campaigns that create challenging environment

Reason for Better
Leaving: opportunity

Company Mashreq Bank U.A.E.
Name:

Designation: Assistant
Team
Leader

Starting September 2006
Date:

Ending
Date:

Role: 1. Assist the sales manager planning the strategy for financial and non-financial targets to successfully meet customers' and organization's expectations
2. Planning the target for submission and approvals per month for the team and Sales Officers
3. Follow up the team work (daily submission, approvals, resubmissions and daily sales reports) throughout daily meetings ensuring that every Sales Officer coming with his target in submission and approvals
4. Provide feedback on credit cards policies and update Sales Officers on daily basis
5. Provide training for the new joiners, giving them full support and motivation to become successful Sales Officers

Company Mashreq Bank U.A.E
Name:

Designation: Senior
Relationship
Officer

Starting April 2006
Date:

Ending
Date:

Role: 1. Achieving the strategic targets
2. Represent the bank in different companies and at all levels
3. Responsible for my team members, providing them with training and updates on a daily basis

Company Mashreq Bank U.A.E
Name:

Designation: Sales
Officer

Starting November 2004
Date:

Ending
Date:

Company Name: Egyptian Commercial Bank

Designation: Customer Services

Starting Date: March 2003

Ending Date: September 2004

Role:

1. Handling customers providing support in solving problems to reach customer satisfaction
2. Creating new client accounts
3. Selling financial products (personal loans, credit cards and personal accounts)

L/C: opening L/C, Amending L/C, checking shipping documents presented under L/C, payment of L/C

Reason for Leaving: Better opportunity

Education History:

High School:	Victoria College	Year of Graduation:	1996/1997
University Degree:	B.S in Commerce	Major:	Accounting
University Name:	Alexandria University	Year of Graduation:	2002

Certificates: International Certificate in Wealth and Investment Management from Chartered Institute for Securities and Investment. (CISI,UK)

Driving License:

- Valid U.A.E driving License

Languages:

Languages skills:

- Arabic: mother tongue
- Fluent written and verbal communication skills in English

Computer Skills:

- Microsoft Windows: excellent user (95, 98, 2000 and XP)
- Microsoft Office (Word, Outlook, Excel, Power point)
- Working skillfully with Internet and Other programs running under this operating system

Personal strengths:

- Ability in making deals with a high performance depending on negotiations and interpersonal skills
- Providing prompt attentive services
- Ensuring accuracy and consistency in job performance and paying attention to details
- Working successfully individually and a keen team worker too
- Reliable and flexible with the ability to adapt readily to the demand of the job
- Strong Management skills and problem-solving.
- Excellent communication and presentation skills.
- Strong sales skills and analytical mind.
- Strategic relationship building skills
- Ability to work under high pressure.
- Strong Customer service skills and deliver high customer satisfaction.
- Ability to achieve and exceed targets and ready to face any challenges
- Result-oriented

Personal Interests:

- Reading
- Traveling
- Listening to music
- Sports

Personal Details:

First Name: Mohamed
Surname: Khalifa
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