

# Rachel Ann C. Cantalejo

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25 years old • Single • Filipino



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## Marketing Assistant / Customer Service Associate

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Highly motivated, dedicated and dynamic Marketing with a proven record of accomplishment of completing projects within the timetable and in accordance with client standards and guidelines. For now, I would like to offer my 5-year experience, acquired training, proficiency and top-notch administrative skills and prove my value as the new Marketing Assistant esteemed company.

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### Career Experience

Banco de Oro (BDO) Unibank Inc., Cabuyao, Laguna, Philippines

#### Marketing Assistant, Year 2018 to 2019

Responsible for the daily operation of sales section of the branch and provides assistance to the Branch Head and Assistant Branch Head in marketing the Bank's and affiliates' products and Services.

#### Key Contributions:

- Responsible for providing a good and successful business relationship with client.
- Supervises and approves the opening of New Accounts Personal and Commercial, Time Deposits, Trusts and Investments.
- Supervises efficient working processes and co-ordinate, assign and review the work of bank clerks engaged in the following duties: processing, verifying and recording financial documents and forms; processing, verifying and recording insurance applications, claims and forms; and collecting user fees and payments on overdue accounts for loans.
- Examines and verifies accuracy of work and authorize withdrawals, redemptions, and other transactions of depositors of the bank.
- Establishes work schedules and procedures and co-ordinate activities with other department. Responsible for the manpower scheduling of the branch clerks especially during peak banking days.
- Resolves work-related problems and prepare and submit monthly progress and performance reports.
- Provides lead referrals for all Consumer Lending Group Products (Credit Card, Personal Loan, Home Loan, Auto Loan, and Small Business Loan) and assists to complete credit card and loan documents.
- Provide lead referrals to Bank's Life and Non-Life Insurance Products.
- Assist and interview clients for Credit Card/ Loan Applications, Internet Banking Enrollment.
- Handles client inquiries and complaints. Also provides information on banking products, policies and services.
- Aims to achieve the yearly quota as required by the management.
- Responsible for checking of daily and monthly Marketing Reports.
- Should maintain zero occurrences of errors on processed transactions.
- Trains and coaches' new Marketing Personnel.
- Reviews insurance applications and verify insurance coverage, premiums paid and other insurance information.
- Responsible for the inventory and releasing of BDO rewards cards.

Banco de Oro (BDO) Unibank Inc., Cabuyao, Laguna, Philippines

#### Customer Service Associate Year 2014 to 2017

Responsible for providing accurate, efficient and timely processing of over-the-counter transactions pertaining to deposits, withdrawals, payments, remittances, foreign currencies and other miscellaneous transactions of the branch.

### Key Contributions:

- Accepts and validates cash & check deposits, withdrawals and encashment.
- Provides lead referrals for all Consumer Lending Group Products (Credit Card, Personal Loan, Home Loan, Auto Loan, and Small Business Loan).
- Provides lead referrals to Bank's Life and Non-Life Insurance Products.
- Prepares and sells Manager's check, gift check, demand draft and foreign currencies.
- Processes Telegraphic Transfer, Remittances, Foreign Exchange Transactions, Cash Card Reload, Bills Payment, Loan Payment and POS transactions.
- Assists Branch Officers in handling client inquiries and complaints.
- Verifies and balances automatic teller machines, calculate service charges and interest payments and notify customers regarding account discrepancies and captured bank cards.
- Compiles records of deposits, withdrawals, bills payments, loan and mortgage payments, and bank cheques.
- Processes loan applications, loan payments, retirement savings plan applications, insurance applications and payments, term deposits, unit investment trust funds placements, drafts and money orders, managers and gift cheques, telegraphic transfers, and foreign currency exchange.
- Answers enquiries and provide information on banking products, policies and services. Responsible to give to customers the service they deserved with a smile.
- Processes enrolments of insurance, cancellations, claims transactions, policy changes and premium payments with the assistance of the financial advisor of the branch.
- Reviews insurance applications and verify insurance coverage, premiums paid and other insurance information with the assistance of the financial advisor of the branch.
- Sells insurance of the bank and answer enquiries and provide information on insurance products, policies and services.
- Answer enquiries and replies to correspondence and assists customers to the proper bank unit that can handle.

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## Professional Achievements

- Year 2019 ~ BDO Banco De Oro) life Supreme Referrer with 214,432 APE
- Year 2018 ~ BDO Life Millionaire's Club Qualifier 2018 with 1,082,000.11 APE
- Year 2018 ~ Give Me Five with Pride Awardee (3rd Year)
- Year 2017 ~ BDO Life Millionaire's Club Qualifier 2017 with 620,000 APE
- Year 2017 ~ Give Me Five with Pride Awardee (2nd Year)
- Year 2016 ~ Bank Assurance 2016 Quota Achiever in Case Count with 9 Issued Cases
- Year 2016 ~ Give Me Five with Pride Awardee (1st Year)

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## Professional Skills

- Exceptional communication and networking skills.
- Proficient in Microsoft Office Suite programs, especially Excel.
- Successful working in a team environment, as well as independently.
- The ability to work under pressure and multi-tasking.
- The ability to follow instructions and deliver quality results
- Goal oriented, diligent, organized and systematic.
- Adept at research practices and Pressure performer.

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## Education and Credentials

**Bachelor of Science in Business Administration, Major in Marketing Management - Year 2014**

Pamantasan ng Cabuyao, Banay-Banay City of Cabuyao Laguna Philippines