

PERSONAL INFORMATION

Adrian Simion

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WORK EXPERIENCE

01/01/2012–Present

Relationship Manager Friedrich Wilhelm Raiffeisen Private Banking

Raiffeisen Bank, Bucharest (Romania)

Wealth management / Private banking

- Achieves volume and revenue goals via the combination of customer acquisition and relationship deepening;
- Personally and proactively effective at building the business, deepening relationships and increasing targeted consumers through the execution of an effective sales process;
- Provides product information actively seeking to acquire, deepen, retain and satisfy profitable relationships;
- Ensures the appropriateness of the sale of Raiffeisen Bank proprietary and third party funds, structured products, bonds, and preferred stocks etc.;
- Growth and retention of Consumer Banking liability book. Checking attrition levels;
- Acquisition of new quality high net-worth customers, correct profiling of clients and maintaining ongoing updates on profile;
- Matching products to the customer;
- Primary focus on Fee and Commission revenue — thru Investment and Insurance Products, followed by growth of balance sheet and acquisition of top customers; offering high-end products;
- Demonstrates all access channels to customers;
- Handles customer service;
- Participates in special projects and tasks including Compliance related activities
- Deliver prospect meetings (in-person presentations) facilitated through networking with various sources;
- Generating own leads, managing the sales process through closure;
- Drive new product development in deposits, insurance, treasury products for retail customers, investments.
- Raiffeisen Bank International: Quality Scout Project 2016 Czech Republic.
- Multiple courses in Romania and Austria.

01/03/2015–31/12/2015

Regional Manager

Smart Europe 2020 NGO, Ploiesti (Romania)

- Primary focus on managing the local experts on mentoring students in simulated business project;
- Ensuring project objectives;
- Courses on simulated business;

01/02/2009–31/12/2011

Sales Coordinator

Raiffeisen Asset Management, Bucharest (Romania)

- Complex job: sales coordinator in funds and wealth management, trainer, marketing;
- More than 200 people in indirect coordination;
- Achieves volume and revenue goals via the combination of customer acquisition and indirectly through coordinated people;

- Personally and proactively effective at building the business;
- Provides product information actively seeking to acquire, deepen, retain and satisfy profitable relationships with internal and external clients;
- Acquisition of new customers;
- Matching products to the customer;
- Handles customer service;
- Participates in special projects and tasks including trainees and motivation related activities;
- Generating own leads, managing the sales process through closure;
- First sales coordinator hired;
- More than 10 times growth in sales after the first year;
- First Asset Manager in Romania by actives after two years.

- 01/10/2008–01/04/2010 **Author of articles**
Curierul National Newspaper, Bucharest (Romania)
Articles on economic topics
<http://www.curierulnational.ro/?do=cauta&q=Adrian%20Simion&page=2&total=248&tip=toate&timp=9999&sort=DESC>
- 01/06/2006–28/02/2009 **Sales Consultant**
Raiffeisen Bank, Bucharest (Romania)
Sales consultant in savings and loans at Drumul Taberei Branch.
- 01/05/2005–30/06/2006 **Sales Consultant**
ING Asigurari de Viata, Bucharest (Romania)
Sales consultant in life insurance.
- 01/01/2004–01/06/2006 **Sales representative**
Allianz Tiriac Asigurari, Bucharest (Romania)
Sales consultant in non-life insurance.

EDUCATION AND TRAINING

- 01/10/2010–Present **Attendant PHD - Macroeconomics**
Academia de Studii Economice Bucuresti, Bucharest (Romania)
Saving as a insurance factor for macroeconomic stability.
- 01/04/2017–Present **Attendant (Syllabus) CFA Institute: Investment Foundations**
CFA Institute Global Network of Societies, Bucharest (Romania)
- 01/10/2008–01/06/2010 **Master degree**
Academia de Studii Economice, Bucharest (Romania)
- 01/10/2004–01/06/2008 **University Degree**
Academia de Studii Economice, Bucharest (Romania)

PERSONAL SKILLS

Communication skills

Courses

Alternative Investments and Risk Management - Raiffeisen Capital Management: 2015

Raiffeisen Capital Management - March 2016 Vienna

Raiffeisen Capital Management Fund Academy - November 2015 Vienna

Raiffeisen Capital Management Fund Academy - November 2010 Vienna

Raiffeisen Centro Bank Summer Academy - June 2016 Vienna

Raiffeisen Centro Bank Winter Workshop - February 2016 Austria Schladming

Sales Consultant in Investments 2015

Soft Skills in Private Banking Relationship Management - Mungo Dunnet Associates Limited Oxford, London

Business Etiquette 2014

Strategic Economics: 2010