

OTTO CHEUNG

UX DESIGNER

EXPERIENCE

Regional Sales Associate | BMO Global Asset Management

MAR 2023 - PRESENT, TORONTO, ON

- Consulted and supported over 400 financial advisors in retail investment salesforce, therefore increased regional (Greater Ontario) mutual fund sales totaled YTD \$85million
- Conducted regional workshops to explore and identify advisors' shortcoming, then provided customized coaching, market update and investor education, hence accelerated regional mutual fund sales
- Partnered with Branch Managers, Regional VPs, Regional Sales Managers and Multi-Asset-Solution-Team to implement sales strategies and addressed all retail investment related queries

Financial Planner | BMO Wealth Management

OCT 2021 - FEB 2023, TORONTO, ON

- Managed \$15million client portfolio and constructed goal-oriented financial plans by providing data-driven recommendation and regular review/ stress test to ensure service quality
- Collaborated with internal and external partners to accomplish customers' organic growth by means of revenue projections and budget forecasts

Personal Banker | BMO Financial Group

JUL 2019 - SEP 2021, TORONTO, ON

- Achieved fiscal gross revenue by \$8million+, achieving 135% overall performance with advisory service regarding everyday banking, financing, wealth management, digitization and other financial needs
- Represented as Digital Banking Ambassador to drive digital transformation by promoting newly launched features, as well as educating customers on ways to detect and prevent digital frauds

CERTIFICATE

Personal Financial Planner | Canadian Securities Institute

JUL 2022

Canadian Securities Certificate | Canadian Securities Institute

JAN 2019

PROJECT

Finansor | Capstone Project

SEP 2023

Lush | Industry Collaboration Project

SEP 2023

ottocheunggc@hotmail.com

647-299-1268

ottocheung.com

linkedin.com/in/ottocheunggc

SKILLS

User Experience Design

UX/UI, Figma (Wireframing & Prototyping), User Research & Testing, Experience Mapping, Agile Methodology

Investment Advisory

Financial Planning, Sales Training/Coaching, Regional Mutual Fund Support, Territory Management, Communication, Salesforce, Microsoft Office

PROFILE

With 5 years experience in the client-facing financial advisory field, I am looking to advance my career as an UX Designer in which I may express my passion bringing human-centered solutions to users on different platforms.

EDUCATION

BrainStation

Diploma, User Experience Design

JAN 2023 - SEP 2023

TORONTO, ON

Toronto Metropolitan University

Bachelors, Economics & Finance

SEP 2012 - MAY 2017

TORONTO, ON