Somila Ndiki

Senior Client Relationship Manager
Investments

https://www.linkedin.com/in/somila-ndiki/
somila.ndiki@gmail.com
+30 694 8706661

About Me

I have worked in the financial services industry for 8 years. A majority of my experience in the field is in financial planning both local and offshore and client servicing. As of October 2021 , I moved into the Investment industry working as a Senior Client Relationship Manager in Investments, focused mainly on discretionary fund manager solutions and fixed income structured products.

Work Experience

Carrick.

Senior Client Relationship Manager- Investments
Carrick Wealth Pty Ltd, leaders in offshore wealth and capital management
October 2021 to December 2022 (1 year, 2 months)

- Created and implemented processes for newly formed Investment Management company.
- Improve the team's efficiency with providing continuous learning and development.
- Help drive and increase assets under management which were over £20 000 000 within the firm's first year of operation.
- Manage the day-to-day operations of investment portfolios, ensuring compliance with regulatory requirements.
- Conduct financial analysis to identify investment opportunities and risks.
- Develop and implement investment strategies for clients based on their objectives and risk tolerance.
- Build strong relationships with clients, providing timely and accurate information.
- Lead process improvement initiatives to enhance efficiency and reduce risk
- Worked closely with other departments to ensure timely and accurate reporting.
- Assisted in the development of investment strategies for clients.
- Maintain relationships with all stakeholders of the business
- Trade in client's investment accounts, maintain client portfolios (raise cash, implement changes in portfolio)

Carrick.

Client Relationship Manager
Carrick Wealth Pty Ltd, leaders in offshore wealth and capital management
September 2018 to September 2021 (3 Years)

- Manage a portfolio of 200+ clients, ensuring their satisfaction and retention.
- Identify opportunities for growth and cross-selling.
- Respond to client inquiries and concerns promptly and effectively.
- Develop and implement client retention strategies.
- Provided exceptional customer service to clients via phone, email, and in-person.
- Resolved client issues and concerns in a timely and effective manner.
- Work closely with other departments to ensure client needs were met.
- Created and implemented a system that the company uses to submit instructions to be actioned on client portfolios.
- Train all new starters on processes and products offered by the company.
- Manage a small team of new starters and ensured they were equipped to manage their own team of financial advisors.
- Compile investment analysis reports and client proposals.

Administrative Assistant
Portfolio Bureau, private wealth managers
January 2018 to August 2018 (8 months)

- Responsible for all client servicing.
- Implement changes to client portfolios.
- Assist in dissolving deceased estates.
- Compiled review reports for clients.
- Worked with a team of financial advisors.

Sable International
Paraplanner, leaders in cross-border financial and immigration services
April 2016 to December 2017 (1 year, 8 months)

- Conduct research and analysis on financial products and services, including mutual funds, stocks, and discretionary fund managed solutions.
- Prepare financial plans and reports for clients, including retirement planning, investment strategies, and risk management.
- Support financial advisors in developing and presenting financial plans to clients.
- Maintain accurate client records and ensure compliance with regulatory requirements.
- Use financial planning software and tools to support the development of comprehensive financial plans.
- Maintained relationships with all internal and external providers.

Financial Adviser
Standard Bank, African bank and financial services group.
May 2014 to March 2016 (1 year, 10 months)

- Met with clients to discuss their financial goals and objectives.
- Conducted financial analysis and prepared customized financial plans.
- Advised clients on investment strategies and asset allocation.
- Monitored clients' investment portfolios and recommended adjustments.
- Provided ongoing financial education and support to clients.
- Developed and maintained relationships with clients.

Relevant Skills

- Microsoft and Google Suite
- Analytical and Problem Solving
- Communication and interpersonal skills
- Training and Development
- Presentation
- Knowledge on regulatory requirements
- Experience in process improvement initiative
- Excellent customer service skills
- Experiencing in managing multiple client accounts
- Proficient in financial analysis and planning software
- Ability to work independently and in a team environment
- Experience in conducting research and analysis on financial products and services
- Excellent organizational and time management skills

Education History

Higher Certificate Financial Planning
Institution: Milpark Education,2018

National Diploma: Financial Information Systems
Institution: Cape Peninsula University of Technology