

SIMON ANSARI

FINANCE TRAINEE 📍 GUILDFORD, UNITED KINGDOM 📞 07940770121

◦ DETAILS ◦

Guildford
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◦ LINKS ◦

[LinkedIn profile](#)

◦ SKILLS ◦

Relationship Management
Communication
Integrity
Resilience
Collaboration
Financial Acumen

◦ LANGUAGES ◦

English
Swedish



PROFILE

A committed and resilient individual whose professional mission is to be impactful with a principles-led approach to finance. This approach is driven by the ability to navigate risks and external pressures to provide consistent value, whilst maintaining the utmost integrity.



EMPLOYMENT HISTORY

Work Experience at Air Social Marketing Agency, Guildford

July 2017 — July 2017

General/Customer Service Assistant at J Sainsbury plc, Burpham

August 2017 — February 2019

Customer Advisor at Lloyds Banking Group, Nottingham

January 2023 — September 2023

- Adopting a solution-oriented mindset, due to the vast range of queries from a diverse customer base, and facilitating appropriate hand-offs where necessary.
- Proactively taking on additional responsibilities, such as Bulk Cash/IDM management, ID & Go etc.
- Retaining a versatile approach to aid the wider network, travelling to other branches, and frequently shifting between various roles within branch to support operational efficiency.



EDUCATION

GCSE'S, George Abbot School, Guildford

September 2014 — June 2016

- 9 A*-C's including Maths and English

A-Levels, George Abbot School, Guildford

September 2016 — June 2018

- Economics- A
- Business Studies- A
- Mathematics- C

BSc Finance, Accounting and Management, University of Nottingham

September 2019 — December 2022

- 3rd Class Hons



FINANCE QUALIFICATIONS

Professional Banker Diploma, Chartered Banker Institute (CBI)

March 2023 — September 2023

Modules Taken:

- Professional Banker Certificate; Pass (76%)
- Introduction to Business Banking; Pass (72%)
- Introduction to Credit; Pass (84%)

International Certificate in Wealth and Investment Management (Level 3), Chartered Institute of Securities and Investment (CISI)

September 2023 — November 2023

- Pass (77%)

Investment Advice Diploma (Level 4), CISI

December 2023 — Present

Modules:

- UK Regulation and Professional Integrity
- Investment, Risk and Taxation
- One of: Derivatives, Securities or Financial Planning & Advice