

# Paloma Pereira

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*Highly motivated and dedicated professional with a strong background in banking operations and administrative support with over 7 years of experience in cooperative banking sector. Ability to work effectively in a fast-paced environment. Self-starter with readiness to take up responsibility as a leader, with the ability to work collaboratively as a team player and contribute to a positive team atmosphere. Excellent verbal and written communication skills with strong research and presentation skills, in the English language.*

**Leadership | Administrative | Secretarial | Liaison | Customer Service  
Organized | Time Management | Interpersonal Skills | Detail-oriented**

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## EDUCATION

Master of Commerce, Mumbai University

May 2017

Bachelor of Commerce, St. Andrew's College of Arts, Science & Commerce

April 2015

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## CERTIFICATION

JAIB, Indian Institute of Banking & Finance

July 2017

DBF (Banking & Finance), FINPLAN - International Institute of Management

March 2016

MS-CIT, MKCL

March 2014

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## SKILLS AND EXPERIENCE

- Provided administrative and secretarial support to the MD & CEO: Managed schedules, appointments, commitments, calls, emails, correspondences, and recording of minutes.
- Facilitated communication and acted as a liaison between executives, department, branches, vendors, and stakeholders.
- Maintained confidentiality and discretion in handling sensitive information.
- Managed the issuance of bank shares, processing requests and maintained accurate records of shareholders and placing the same at the board of directors' meetings, periodically.
- Organized & arranged the shareholder annual general meetings and elections of the board of directors.
- Performed various daily branch banking operations and ensured compliance with regulatory requirements and bank policies & procedures.
- Provided exceptional customer service to bank customers, addressing inquiries over the counter, on call, and through email.
- Utilized cold call techniques to effectively sell loan products to potential customers.

## **PROFESSIONAL EXPERIENCE**

### **Trainee Officer**

#### **Citizencredit Cooperative Bank Ltd, Mumbai**

**May 2016 – April 2024 (8 years)**

- ◆ Secretary to Managing Director and Chief Executive Officer (June 2022 – April 2024)
  - Provided administrative and secretarial support to the MD & CEO.
  - Managed schedules, appointments, commitments, attended to calls, responded to emails, drafted correspondence, attended meetings and recorded minutes.
  - Facilitated communication and acted as a liaison between executives, department, branches, vendors, and stakeholders.
  - Handled administrative tasks including filing, document organization, report preparation, and travel coordination.
  - Maintained confidentiality and discretion in handling sensitive information.
- ◆ Shares Department (April 2018 - June 2022)
  - Managed the issuance of Bank shares, processing requests and maintained accurate records of shareholders and placing the same at the Board of Directors' meetings, periodically. Handled all other administrative tasks in the department.
  - Assisted shareholders & staff with any queries pertaining to the shareholdings.
  - Organized & arranged the shareholder annual general meetings and elections to the Board of Directors.
- ◆ Branch Operations (May 2016 - April 2018)
  - Performed various daily branch banking operations such as, posting cheques, NEFT, Cash management, including deposits, withdrawals, and currency exchanges, opening new accounts, processing account closures, updating customer account information, accurately and securely. Ensuring compliance with regulatory requirements and bank policies & procedures. Marketed various Bank products and value-added services to customers. Performed other administrative tasks such as filing, record-keeping, data entry, etc.
  - Provided exceptional customer service to Bank customers, addressing inquiries over the counter, on call, and through email.

### **Business Development Executive**

#### **Sunrise Finance, Mumbai**

**November 2015 - February 2016 (4 months)**

- ◆ Utilizing cold call techniques to effectively sell loan products to potential customers.
- ◆ Addressing inquiries on call and through email.

### **Travel Desk Department Assistant (Intern),**

#### **VFS Global, Mumbai**

**March 2014 - May 2014 (2 months)**

- ◆ Posted at the Travel Desk Department. Effectively managing and processing documentation for staff scheduled for international travel
- ◆ Overseeing various administrative tasks such as data entry, filing, document organization, report preparation, etc.