KATRINA SARAH A. FONTANILLA , MBA, RFP

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Profile

A Finance practitioner with 10 years of experience specializing in Personal Finance, Asset and Wealth Management, Trust Funds and Investment Management. Duly certified/licensed by Philippine regulatory bodies for competencies in dealing with Mutual Funds, UITF's, Life Insurance and Variable Life Insurance. MBA Degree holder from the top business school in the Philippines. Skilled in handling ultra high net worth clients.

Work Experience

Relationship Manager- Novel Capital, Inc. (July 2015- Oct. 2016)

Main responsibilities are Business Development and Relationship Management. Key activities include growing the business through solicitation of new accounts and/or additional business from existing high net worth clients. Ancillary responsibilities include development of new revenue streams to further support growth objectives.

Investment Counselor-BPI Asset Management and Trust Group (2014-2015)

Main responsibilities include servicing and administration of Trust and Investments portfolio of Private Banking clients. Ancillary responsibilities include increasing clients awareness for other bank products to be able to deliver a holistic and client centric service to the high net worth clientelle.

Portfolio Officer- AB Capital and Investment Corp. (2008-2014)

Main responsibilities include servicing and administration of Trust and Investment Management accounts of both individual clients and institutional clients. Ancillary responsibilities include investments reporting and ensuring strict compliance with regulatory policies.

Education

De La Salle University- Graduate School of Business (2012-2014)

Master of Business Administration

De La Salle University- Manila (2003-2006)

Bachelor of Science Degree in Commerce, Major in Business Management
Dean's List: 1st Term, SY 2003-2004; Dean's List: 1st Term, SY 2004-2005

Southernside Montessori School- (1999-2003)

High School Diploma, 2003.
1st Honorable Mention, 2000; 4th Honorable Mention, 2001;
3rd Honorable Mention, 2002; 3rd Honorable Mention, 2003

Professional Education

Registered Financial Planners Institute (2010)
Registered Financial Planner Certification

Trust Institute Foundation of the Philippines (2008-2009)
Trust Operations and Investment Management Course
Graduated with Certificate of Distinction

Certification and Licenses

Certified Fixed Income Market Salesman (Nov. 2015)
Securities and Exchange Commision

Certified Investment Solicitor (Sep. 2015)
Securities and Exchange Commision

Standardized UITF Trainor Certification (Oct. 2013)
Trust Institute Foundation of the Philippines

Life Insurance License (2008)
Insurance Commission

Variable Life Insurance License (2008)
Insurance Commission

Special Projects

External Asset Management Business setup with UBS
A Business Development Project for Novel Securities, Inc.
Headed the establishment of the business setup with UBS SIngapore. The initiative is expected to be a main revenue stream of the company in the medium term.

Estate Planning 101
June 2015. Event for BPI AMTG-Wealth Management Division.
Part of the core planning team which conceptualized, planned and organized the Estate Planning even for the Private Banking clients.

Fund Management Proposal
July 2014. Project for AB Capital and Investment Corporation
Developed the Fund Management Proposal for use as a standard marketing material for Institutional Business Solicitation. Project involved completeness and accuracy of corporate information and, most importantly, compliance of content and intent with regulatory mandates by the BSP and SEC