QUAN PHAM

Anaheim, CA, USA quanpham4602@yahoo.com 714-323-2090 quanmph

SUMMARY

Client-focused financial services professional with 15+ years of experience supporting complex accounts, administering regulated financial products, and resolving high-volume client inquiries. Proven ability to partner with internal teams, external stakeholders, and auditors to ensure accurate administration, compliance, and exceptional service delivery. Known for strong learning agility, problem-solving, and clear communication in fast-paced service environments.

EXPERIENCE

Client Relationship Specialist

Capital Group — April 2025 - September 2025, Irvine, United States

- Provided day-to-day service support for institutional and client accounts, responding to inbound inquiries via phone and email with accuracy and professionalism.
- Partnered with internal teams and external business partners to ensure accurate account administration and timely resolution of client requests.
- Assisted with audits by evaluating request scope, gathering required data, and ensuring accuracy and compliance with internal procedures.
- Monitored operational workflows, identified process gaps, and supported continuous improvement initiatives.
- Maintained detailed documentation and ensured adherence to policies, procedures, and regulatory standards.

Relationship Banker

Bank of America — January 2009 - July 2015, Westminster, United States

- Supported a large portfolio of retail and small-business clients across regulated financial products
- Educated clients on financial products, features, fees, and compliance requirements in clear, client-friendly language
- Ensured accurate documentation, policy adherence, and risk controls across all transactions
- Resolved complex service issues through analytical problem-solving and collaboration with internal partners
- Prepared internal reports and client summaries to support audits and operational reviews

Real Estate Agent

Redfin

March 2015 - Present, Orange County, United States

- Advised clients through complex, highly regulated transactions requiring strict documentation and deadline management
- Served as primary liaison between clients, lenders, escrow officers, and third-party partners
- Interpreted contracts, disclosures, and compliance requirements while managing high client expectations
- Utilized CRM and analytics tools to track workflow status, improve responsiveness, and enhance client experience

EDUCATION

Admitted for Fall 2026 - Master of Business Administration

University of Illinois at Urbana-Champaign · Urbana, IL · 2027

Bachelor of Arts (B.A.) in Finance, General

California State University-Fullerton · Fullerton, USA · 2011

SKILLS

- Retirement Plan & Financial Services Administration (Transferable)
- Client & Participant Support (Inbound Calls, Email, Portals)
- Audit Support & Data Accuracy
- Financial Regulations & Compliance
- Process Improvement & Operational Excellence
- Stakeholder Communication (Internal & External)
- Documentation Review & Quality Control
- CRM & Financial Systems

- Data Analysis & Reporting
- English, Vietnamese
