

CURRICULUM VITAE

PERSONAL DETAILS

NAME : SOFIA WAIRIMU GATURI
NATIONALITY : KENYAN
DATEOFBIRTH : 3TH NOVEMBER, 1990
MARITAL STATUS : MARRIED
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PASSPORT NO : BK311545
RELIGION : CHRISTIAN
HEIGHT : 5FT 2INCHES
WEIGHT : 69KG
LANGUAGE : ENGLISH & KISWAHILI

CAREER PROFILE

My objective is to obtain a position in an organization where my skills are valued and can benefit the organization to achieve its goals.

WORK EXPERIENCE

September 2021 to May 2023: Pioneer Insurance, Financial advisor.

Key areas of Responsibility

- ❖ Provide comprehensive financial planning and investment advice to clients based on their financial goals, risk tolerance, and time horizon.
- ❖ Develop and implement customized investment strategies to help clients achieve their financial objectives.
- ❖ Conduct regular portfolio reviews and rebalancing to ensure clients' investment portfolios are aligned with their goals and risk profile.
- ❖ Build and maintain strong relationships with clients to gain their confidence and trust.
- ❖ Collaborate with a team of financial professionals to deliver a full range of financial services, including retirement planning, tax planning, and estate planning.

- ❖ Consistently meet or exceed sales targets and contribute to the overall growth and success of the firm.

September 2018 to June 2019: Equity Bank, Relationship Officer

Identifying and assess customer's needs to achieve and retain satisfaction based on:

- ❖ Credit sector.
- ❖ Equitel lines.
- ❖ Insurance policy.
- ❖ Equity agency.
- ❖ ATM cards.
- ❖ Customer accounts.
- ❖ Online banking.

October 2017 to August 2018: M-KOPA SOLAR, Customer Care

Key areas of Responsibility

- ❖ Giving customers the best experience through inbound and outbound calls.
- ❖ New Business: Attract potential customers by answering product and service questions, suggesting information about other products and services.
- ❖ Customer Relationship Management: Maintain customer records by updating their account information.
- ❖ Problem Solving: Solve product or service problems by understanding the customer's complaint and finding the cause of the problem.
- ❖ Customer Service: Selecting and explaining the best solution to solve problems, quickly assisting with correction or adjustment and following up to ensure resolution.

July 2014 – September 2017: Digital Divide Data Kenya. Quality Analysis/Control

Key areas of Responsibility

- ❖ Review work done at the data entry level.
- ❖ Identify errors on submitted tasks at least 95% quality.
- ❖ Assure quality control on production.
- ❖ Approve finished tasks by confirming specifications; returning tasks for re- work and confirming re-work.

- ❖ Recommend adjustments to the tasks on entry level that did not meet 95% quality.
- ❖ Accomplish quality and organization mission by completing related results as needed.
- ❖ Document tasks results by completing reports, summarizing re-work and sending the final report to the Production Manager when requested to.

August 2012 – June 2014: Digital Divide Data Kenya, Data Entry.

Key Areas of Responsibility

- ❖ Key in data on the projects' interface.
- ❖ Search for valid programs according to the projects instructions.
- ❖ Online research to collect project specific data/information.
- ❖ Field Research:- physical collection of data in selected areas.
- ❖ Editorial work.
- ❖ Perform other tasks as requested which are in line with company goals and objectives.

EDUCATIONBACKGROUND

JAN 2022-To date : Human Resource Management Professions Board (HRMPEB).
2014 - 2017 : Kenyatta University Bachelor of Commerce (Human Resource option).
2008 - 2011 : Kiine Girls Secondary (K.C.S.E) attained an overall grade of (B-).

Mr. Caxston Gitari

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