

## PERSONAL DATA

Name and surname: Ada Kowalska  
Date of birth: on 01/08/1982  
Address: Stara 15, 01-186 Warsaw  
Phone number: 600-000-001  
E-mail: a.kowalska@gmail.com

## EDUCATION

2007 Europejska Akademia Planowania Finansowego (European Academy of Financial Planning)  
Postgraduate studies: EFC ® certified financial advisor  
PL10EFC00096, EFG@PL07EFG00088

2006 Politechnika Warszawska (Warsaw University of Technology)  
Graduate studies: Mathematics

## PROFESSIONAL EXPERIENCE

**07.2008–present**

### **Financial advisor – Bank XYZ**

- monitoring the offer of financial institutions
- preliminary analysis of the financial situation of individual clients
- investment and product advisory services
- preparation and presentation of offers of investment and credit solutions
- optimization of costs of financial products
- assistance in selecting mortgage loans for individuals and businesses

**08.2006–06.2008**

### **Junior financial advisor – ABC Advisors Sp. z o.o.**

- ongoing customer service
- developing relationships with agents and other cooperating economic entities
- services provided for a large entity from the Asset Management sector
- advice services concerning the choice of mortgage loan and investment products
- identification of the needs and financial capabilities of the client
- sale of financial products

## COMPLETED COURSES AND TRAININGS

2008 - European Academy of Financial Planning, completing graduate studies and passing the exam necessary to obtain the European Financial Consultant Certificate (EFC®) - II degree Financial Advisor

2007 - Bodo Schäfer Certificate of participation in the Financial Conference held in Warsaw organised by INVEST SUCCESS® Your Learning Partners

## OTHER SKILLS

**Able to use:**

Microsoft Office: Excel, Word, Power Point, Outlook

**Languages spoken:**

English (advanced)  
German (basic)

**Interests:**

traveling, movies, books, music, sports

*I agree to have my personal data processed for any purposes necessary to the recruitment process in accordance with the Personal Data Protection Act of 29 August 1997, Dz. U., No. 133 item 883.*