

PHARISA SRIPUWIENG

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PROFESSIONAL SUMMARY

Highly organized and detail-oriented professional with over 13 years of experience in executive support, sales coordination, and operations management. Proven ability to support Financial Advisors by developing tailored financial plans, managing mutual fund transactions, and coordinating client care, ensuring exceptional service for over 300 clients. Strong background in B2B/B2C sales, event organizing, and seamless cross-functional communication. Adept at problem-solving, multitasking, and building client relationships. Seeking to leverage comprehensive administrative and sales expertise in a Secretary, Assistant, or Sales position.

CORE QUALIFICATIONS

- **Executive Support & Administration:** Strategic appointment scheduling, task delegation, tax filing assistance, and comprehensive document preparation.
- **Sales & Financial Coordination:** Crafting financial proposals (retirement, tax, and education), mutual fund account management, and premium collection.
- **Client Relations & Problem Solving:** Hospital coordination for admitted clients (facilitation and discount negotiation), and maintaining relations with 300+ clients.
- **Event & Operations Management:** End-to-end customized tour planning, corporate seminars, team-building execution, and international tour leading.
- **Technical & Soft Skills:** Microsoft Office Suite, Canva, highly responsible, service-minded, and works efficiently under pressure.

WORK EXPERIENCE

Assistant to Financial Advisor Unit Manager | Sinsubpanthavee Co., Ltd. | Jul 2015 – Apr 2026

- Prepared comprehensive sales proposals and financial plans (retirement, tax, and children's education) based on the executive's strategies, directly supporting the achievement of sales targets.
- Facilitated daily operations for an 8-member team and managed relationships with a portfolio of over 300 clients.
- Executed mutual fund transactions, including opening accounts and managing buy/sell orders, while overseeing insurance premium collections.
- Coordinated with hospitals during client admissions to facilitate seamless medical services and negotiate special discounts.
- Assisted clients with annual tax planning and ensured accurate and timely tax return filings.

Operations and Sales Officer | Daffy Tour Co., Ltd. | Jun 2013 – May 2015

- Proactively contacted prospective clients to present and sell customized tour programs, driving business growth.
- Designed tailor-made itineraries and acted as a full-service event organizer for corporate seminars, walk rallies, and team-building activities.
- Coordinated efficiently with diverse suppliers, including hotels, restaurants, transportation services, and tourist attractions.
- Managed on-site operations and guided clients during trips to ensure flawless execution and high customer satisfaction.

Freelance Tour Guide & Event Staff | Freelance | Mar 2012 – Present

- Acted as an International Tour Leader and Domestic Tour Guide, delivering exceptional travel experiences.
- Operated as freelance staff for promotional booths and facilitated corporate team-building events alongside full-time employment.

EDUCATION

- **Bachelor of Arts in Tourism** | GPA: 3.04 2008 – 2012
Rajamangala University of Technology Phra Nakhon