

Amanda Carrillo

Private Wealth Management | Client Service Associate

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Summary

Trilingual English-Portuguese-Spanish client service professional with a background in banking customer support and airline service. Experienced in handling client inquiries, resolving sensitive issues, communicating clearly, and maintaining organized documentation in fast-paced environments. Currently pursuing introductory CFA-focused financial studies, with plans to pursue the FINRA Series 7 license when eligible. Committed to building a long-term career in private wealth management and supporting financial advisors in delivering exceptional client experiences.

Skills

Client Relationship Support · Banking Customer Service · Account Inquiries · Issue Resolution · Client Documentation · Discretion & Confidentiality · Multilingual Client Communication · English & Portuguese

Experience

United Airlines

2023 - 2025

Customer Service

- Assisted customers with service requests and resolved issues through clear, professional communication.
- Handled time-sensitive inquiries while maintaining attention to detail and service standards.
- Coordinated information and follow-up to support a positive customer experience.

TAP Air Portugal

2022 - 2023

Customer Service

- Supported English- and Portuguese-speaking customers with inquiries and service needs.
- Explained procedures, addressed concerns, and helped customers navigate service options.
- Maintained organized communications in a high-volume customer-facing environment.

Banco Carrefour

2017 - 2020

Banking Customer Service

- Assisted banking customers with routine inquiries and service-related requests.
- Communicated financial product and account information in a clear, customer-friendly manner.
- Supported accurate handling of customer information and escalated issues when appropriate.

Licensure & Education

Introductory CFA-focused financial studies: in progress

FINRA Series 7: planned next step, not yet licensed (requires firm sponsorship)

High School Diploma

Languages

Portuguese: fluent

English: fluent

Spanish: proficiency to confirm