

PROFESSIONAL CERTIFICATE FOR FINANCIAL ADVISORS (CERT. FA)

GRADUATE SPOTLIGHT

Jason Julien

"The learnings and course content in the Cert. FA program is an excellent foundation for anyone seeking a career in banking and financial services. The Program is well structured and focused on the key areas of competence that are expected of all professionals in the industry. I thoroughly enjoyed the knowledge gained over my Cert. FA journey and I am most thankful for the experience from start to successful finish".

These words were expressed by IBF's 2018 Cert. FA Valedictorian and top Banking Specialization Graduate after attaining his Professional Certificate as a Certified Financial Advisor. IBF in this article OR took a moment to chart his journey of over 21 years in the finance industry so he can share his passion and highlight what motivates him to succeed at every stage in his career. Jason Julien is currently the Deputy Chief Executive Officer – Business Generation, First Citizens and we are delighted to share his insights to our questions in our 'Graduate Spotlight Series'.

1. What were some of your most powerful learning moments?

The need to be a continuous learner whether in year one or 20 years later, regardless of level and position, learning never stops. I've learnt to consume the world around me and keep up-to-date and be current in all areas of work and life in general. The most powerful moment is the ability to reflect on past situations and apply lessons learnt to treat each circumstance differently having acquired these teachings and gone through countless journeys.

2. What is one of your biggest fears you have faced?

The ability to speak prolifically in public and in various spheres including large platforms, both comfortably and with confidence. Overcoming anxiety and fear to connect to and persuade all audiences, especially senior members in a board room setting, especially being younger relative to my peers and other colleagues.

3. What is the best career advice you have received?

The best career advice I have ever received comprised of two valuable lessons from Peter Ganteaume, Former Senior Partner, PricewaterhouseCoopers Limited. The first advice is the use of time and time management. The second is the use of language to convey your message clearly; not only to influence others but also to make an impact, so that your words resonate with the audience to have a long lasting impression.

4. What skill did you wish you learnt earlier in life?

To speak a foreign language fluently and at conversational level. Although I took a course at University Level in Portuguese and learned many historical facts and details, I was never fluent in the language and could not engage at a business level. Having a foreign language as a second language is a highly beneficial skill for businessmen and businesswomen to acquire as the global landscape has become much smaller and accommodating.

5. What advice would you give others who want to develop and advance in their career?

Find a way to differentiate yourself and stand out from the crowd. At present many persons have the same level of qualifications and have achieved higher level education. Therefore, driving you to build on your unique skill set and competencies. For example: being an expert in excel, image management, dependability, meticulous in report writing and pay attention to detail, good work ethics and a mix of multiple factors to keep you on the edge of the competition.



Jason Julien Cert. FA Banking Graduate
Deputy CEO – Business Generation
First Citizens

WORK EXPERIENCE

2010 – Present

Deputy CEO - Business Generation
FIRST CITIZENS -(Caribbean and Central America)

General Manager – First Citizens
Investment Services Limited
FIRST CITIZENS

2006-2010

Vice-President – Investments
GUARDIAN ASSET MANAGEMENT (Caribbean)

2003-2006

Assistant Vice-President – Business Development
GUARDIAN HOLDINGS LIMITED
(Caribbean, Central America, London, Gibraltar)

2001-2003

Manager – Asset Based Finance;
Manager – Mergers & Acquisitions
CITIGROUP – GLOBAL CORPORATE & INVESTMENT BANK

1997-2001

Senior Consultant - Financial Advisory Services
PRICEWATERHOUSE COOPERS LIMITED