

Economics and Finance Graduate with experience in client support and financial services. Possesses a strong track record of providing financial advisement, management, and analysis. Excels in analytical roles, deploying exceptional organizational and management skills to oversee variance analysis, account reconciliation, and financial reporting, while continuously striving to improve financial control processes.

AREAS OF EXPERTISE

Financial Accounting	Cost Management	Banking
Bank Reconciliations	Invoicing Analysis	Leadership
Strategic Planning	Financial Reporting	Client Support
Budgeting and Finance	Business Presentation	Customer Service
Business Communication	Forecasting & Variance Analysis	Financial Statements

PROFESSIONAL EXPERIENCE

Customer Service Representative ■ TD Canada Trust *xxxxxxx – Present*

- Provide sound financial solutions and advice for various customer accounts.
- Assist clients in achieving financial goals through accurately assessing various financial documents.
- Accurately processes financial transactions, while staying aware of emerging customer financial needs.
- Manage client relations by offering value-added advice and quick resolution of customer concerns.
- Redirect clients to appropriate departments to resolve any outstanding customer issues.
- Open and close the branch as well as ensure bank records are balanced at the end of the day.

Supervisor ■ xxxxxxxxxxxxxxxxxxxxxxx *xxxxxxx – January 2013*

- Relied on for the opening and closing of the restaurant and bar.
- Verified and secured cash-outs of servers and bartenders utilizing cash management skills.
- Managed up to 12 team members and provided scheduling of restaurant and bar staff.
- Utilized leadership and coaching ability to provide training and development services.

EDUCATION & PROFESSIONAL DEVELOPMENT

BACHELOR OF ARTS IN ECONOMICS AND FINANCE, 2015

University of xxxxxxxx

Courses: Portfolio Management, Options Derivatives, and Corporate Finance

Extra-Curricular Activities: Competed in the 2015 CFA Research Challenge, Member of the University of Winnipeg Investment Group (UWIG), and TMX Options Trading Competition.

Chartered Financial Analysis Project (CFA) Research Challenge ♦ 2015

Description: Researched brewing company, analyzed divided history, interviewed CEO, established future financial goals, and reviewed financial records to forecast stock prices.

Deliverables: Competed against schools in Western Canada. Presented analytical research to a panel of experts utilizing public speaking knowledge.

Duration: 6 months

Team Size: 4

BUSINESS ADMINISTRATION DIPLOMA WITH CONCENTRATION IN FINANCIAL SERVICES, 2012

xxxxxxx College

Courses: Financial Management, Securities and Investments, Personal Finance, and Consumer Banking.

Aroma Tea Business Project ♦ 2012

Description: Developed business plan for tea retail outlet. Implemented an Asian import strategy to secure tea distribution of international brands. Completed competitive analysis.

Deliverables: Presented new business in trade show environment and communicated benefits and features of company, organizational structure, goals, and business strategy.

Duration: 1 year

Team Size: 5