

Dynamic Self-Starter - Analytical Problem-Solver - Ambitious Learner

PROFESSIONAL PROFILE

Bachelor of Commerce graduate with earned industry experience with **Scotia Wealth Management – Private Investment Counsel**. Focused on adding value to bcIMC as an Associate, Trade Management. Recognized for **enhancing business operations** through **detailed research skills**, **diligent customer care**, and the ability to **develop analytical strategies**. Demonstrates **innate problem solving abilities** and **strong IT knowledge** in all professional and academic successes. In addition, **bilingual (Punjabi)** with a **global mind-set** from international experience, which provides for quick adaptation to new settings. Excellent **self-study competency** as a **2016 Level I CFA candidate**.

CORE INDUSTRY ABILITIES

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| • Portfolio Management | • Financial Transaction Analysis |
| • MS Excel, Word, Access, and PowerPoint (2016) | • Business Development (Private Clients) |
| • Risk Management Policies | • Account Reconciliation |
| • Investment Management Administration | • Interpersonal Skills to Build Relationships |

EDUCATION

Bachelor of Commerce (Finance), University of Victoria

September 2011 – August 2015

- 2015 Graduating Class Valedictorian
- GPA: Business Program: 3.6/4.0
- Relevant Courses: Management Finance (A+), Statistics (A+), Managerial Economics (A+), and Financial Accounting (A-)

Financial Economics, Masaryk University

September 2014 – December 2014

- Attended a semester abroad in the Czech Republic through the University of Victoria's International Exchange Program
- Relevant Courses: Financial Investments (A), Financial Mathematics (A), and Application of Math-Economic Models (A)

CERTIFICATIONS

Level I Chartered Financial Analyst Candidate, CFA Institute

Expected Completion: June 2016

Conduct and Practices Handbook, Canadian Securities Institute

Completed: November 2015

Canadian Securities Course, Canadian Securities Institute

Completed: August 2014

INDUSTRY EXPERIENCE

Portfolio Administrator, Private Investment Counsel, Scotia Wealth Management – Vancouver, B.C. Sept. 2015 - Present

- Started as a Co-op student (Jan. 2015 – April 2015) and received competitive full-time offer immediately after graduation
- Assisted senior portfolio managers with the daily maintenance of high net-worth (\$1,000,000+) client investment portfolios
- Implemented new business development strategies, which resulted in over \$4.5 million in fee-based revenue
- Spearheaded presentations for all institutional clients that consisted of economic outlooks and year-in reviews
- Managed all aspects of trade execution, trade settlement through our Custody department and Toronto partners
- Developed strong relationships with existing and new client base, which opened up additional business opportunities

Financial Advisor (Co-op), Scotiabank – Victoria, B.C.

May 2014 – August 2014

- Conducted thorough analysis of possible investment opportunities for clients that resulted in \$860,000 of new business for Scotiabank by understanding the needs of each client and presenting solutions
- Supported the short-term and long-term financial goals of customers through knowledgeable recommendations of day-to-day accounts and methods of credit: lines of credit and credit cards
- Assisted Senior Financial Advisors in the process of tailoring and managing investment accounts such as RRSPs, TFSAs, RESPs, and RIFs to customers' needs in order to allow them to optimize family and personal wealth

Customer Service Representative, Scotiabank – Victoria, B.C.

December 2012 – May 2014

- Maximized customer experience by building long-term client relationships through my promise of service excellence
- Optimized branch financial earnings by referring over \$210,000 per month to Financial Advisors by using strong product knowledge and analysis skills to discover sales opportunities
- Trained incoming employees on bank policies by professionally handling daily cash flow of \$14,000 with 100% accuracy
- Earned first place in the 3-month SCENE Promotion campaign for most SCENE credit card referrals (Over 110 sales: credit limit of \$500 – \$20,000 per card)

VOLUNTEER EXPERIENCE

University Ambassador, Bloomberg L.P. – Victoria, B.C.

April 2015 – August 2015

- Partnered with Account Managers at Bloomberg L.P. to increase awareness of the Bloomberg Aptitude Test at the university and encourage fellow students to earn the essential qualifications to better compete in the job market

Team Member, Investment Group – University of Victoria (UVic.) – Victoria, B.C. June 2014 – August 2015

- Led weekly meetings on current world-wide financial and economic events that engaged fellow members
- Advanced my personal knowledge on a career within Investment Management by networking with industry professionals

4th Year Member, Board of Advisors, Commerce Students' Society, UVic. – Victoria, B.C.

May 2014 – Present

- Provided careful analysis of the annual budget for the 2014-2015 fiscal year and recommended strategic solutions that allowed the Gustavson Business program to better serve the student body
- Represented the interests, opinions, and values of current undergraduate students at bi-weekly meetings with the business faculty by exercising a natural leadership ability

Director of Athletics, Commerce Students' Society, UVic. – Victoria, B.C.

August 2013 – May 2014

- Managed an annual financial budget of \$5000 through successful allocation of funds to sporting events for the students
- Strengthened sponsor relationships by applying strong external communication and project management skills

AWARDS AND ACHIEVEMENTS

Valedictorian, Peter B. Gustavson School of Business – Victoria, B.C.

November 2015

- Selected among 240 graduating students to represent the class and give a speech to students, families, professors, community leaders, and various other stakeholders of the Gustavson Business School

Thomas (Bill) Orr Scholarship in Business, University of Victoria – Victoria, B.C.

August 2014

- Awarded \$1500 for combining academic excellence with involvement in university athletic and campus organizations

Kyle McMillan Scholarship Award, University of Victoria – Victoria, B.C.

January 2014

- Awarded \$500 for excellence in academics, public speaking, and leadership within the Gustavson Business program