

Anqi(Angie) Shi

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EXPERIENCE

Financial Service Specialist

08/2023-now

CIBC

- Advise clients on comprehensive financial planning, including day-to-day banking, investments, lending, and estate planning.
- Report daily through CRM (client relationship management) to make sure the communications and activities are correct.
- Interprets and analyzes existing regulations and requirements and provides advice to insure ongoing compliance.
- Generated over 2 million in referrals to partners through effective relationship building.

Personal Banker/ former Financial Advisor

03/2022-07/2023

TD Canada Trust

- Advise clients on comprehensive financial planning, including day-to-day banking, investments, lending, and estate planning.
- Engage with clients on a personal level, ensuring meaningful interactions and tailored solutions.
- Cultivate a strong network to establish new client relationships and generate referrals.
- Achieved exceptional investment results, surpassing targets by 300% in one quarter.
- Generated over 2 million in referrals to partners through effective relationship building.

Financial Services Representative

03/2021-03/2022

CIBC

- Provided financial advice to clients, establishing relationships while meeting performance targets.
- Deeply understood the local market and potential client base to create effective sales plans.
- Leveraged a wide range of credit and investment solutions to deliver needs-based recommendations.

Customer service representative (part-time)

04/2020-02/2021

CIBC

- Processed financial transactions and offered personalized solutions to clients.
- Booked appointments with financial service representatives to ensure client needs were met.
- Delivered exceptional customer experiences and contributed to operational improvements.

Research assistant

09/2019-06/2020

University of Ottawa---sustaining knowledge commons project

- Collecting and resorting publisher information panel data using Excel and SPSS
- Collaborating with team members to manage our blogs and academic website
- Preparing team monthly meetings on budgeting, putting together member's results and present achievements.

EDUCATION

University of Ottawa	Ottawa, Canada
Master of Management, Finance	09/2018-10/2020
Huazhong Agricultural University	Hubei, China
Bachelor of Management in College of Economics and Management	09/2014-06/2018
Agricultural and Forestry Economy Management	GPA: 3.5/4.0

CETIFICATION & SKILLS

- Certified professional in MFDA(Ontario)
- Personal Financial Services Advice, Financial planning 1 completed with proficient in educational savings plans, financial advising, financial planning, financial services, goal planning, investment funds, lending, personal investments, residential mortgages, retirement planning, and retirement planning services.
- Strong computer skills: Microsoft Office (Word, Excel, PowerPoint), SPSS, Bloomberg terminal.
- Languages: English and Chinese

ACTIVITIES & AWARDS

- **Deputy Director of Secretariat in Student Union**
- **Voluntary Work in Thailand**
- **Title of "Merit Student"**