**Manpreet Kaur**

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**Summary of Qualifications**

* Employed as Associate Financial Advisor with CIBC.
* Worked as Personal Banking Associate with TD Canada Trust.
* Successfully completed Canadian Security Course (CSC), Personal Financial Services Advice and Financial Planning 1 course from Canadian Securities Institute
* Completed Financial Services Ontario College Graduate Certificate program from Algonquin College.
* Master of Business Administrations (MBA) in Finance and Marketing
* Bachelor of Commerce with Accounting.
* Overall 10+ years of experience in retail banking.
* Computer skill: MS Word, Excel, Power Point, Outlook Express and other banking software such as Flex cube.
* Excellent communication skill: multilingual: fluent in English, Hindi and Punjabi.
* Possess strong leadership and motivational skill: proven success in motivating and guiding team towards consistently achieving assigned target.
* Highly energetic, detail oriented, problem solver, good team player and customer focused.

**Core Skills**

* Proven relationship building and client retention skills with integrity and respect.
* Analytical and strategic thinking with decision making and judgement to achieve desired results.
* Providing best in class client service by preparing results-oriented portfolio management plans.
* Proactively increasing corporate business by collaboration and network building.
* Planning and organizing daily tasks due to variation in roles and adaptability.
* Maintaining high levels of confidentiality with record keeping

**Professional Experience**

**Associate Financial Advisor – Retail Banking 03/2021- Present**

CIBC

* Help customers with their Mortgage, Home equity needs.
* Help customers with their registered and non registered investment needs.
* Help customers in day-to-day advice needs like account opening, credit card, service transactions, digital education, lending solutions, and customer problem resolution related to banking solutions.
* Participate in the timely and accurate completion of business processes and procedures.
* Help build a positive and equitable work environment by promoting team effectiveness, participating in personal performance development, and sharing industry knowledge to achieve common objectives.
* Ensure prepared documentation is accurate, reflects business intentions, and is consistent with relevant regulations of Conduct and Ethic.
* Identified referral opportunities to further grow the customer relationship collaborating with other business units like wealth management.

**Personal Banking Associate - Retail Banking 09/2019 -03/2021**

TD Canada Trust

* Helped customers in day-to-day advice needs like account opening, credit card, service transactions, digital education, lending solutions, and customer problem resolution related to banking solutions.
* Participate in the timely and accurate completion of business processes and procedures.
* Helped build a positive and equitable work environment by promoting team effectiveness, participating in personal performance development, and sharing industry knowledge to achieve common objectives.
* Responsible as frontline staff with cash and non-cash transactions like Cheques, credit card payments, Bill Payments transactions, wire transactions.
* Ensure prepared documentation is accurate, reflects business intentions, and is consistent with relevant regulations of Conduct and Ethic.
* Identified referral opportunities to further grow the customer relationship collaborating with other business units like wealth management .

**Assistant Manager - Retail Banking 08/2011 - 03/2018**

Lakshmi Vilas Bank Limited (India)

[https://www.lvbank.com](about:blank)

* Built and maintained customer relationship through networks and referrals, resulting in growth of client numbers to 10 folds in 8 years.
* Proactively engaged with customer to identify their needs through meaningful conversation.
* Advised and offered financial solutions and products to meet customers’ everyday banking and investment needs.
* Helped customers find new and alternate ways to bank by offering convenience and value of their time, retaining them on mobile and online banking channels.
* Provided excellent relationship management, offered customized financial solutions, ensured long term customer retention and business development
* Supervised a team of more than 10 staff members of bank branch.
* Managed collection for Personal Loan, Mortgage and Business Loan
* Analysed, reviewed, approved or rejected banking account and deposit applications in accordance with authorized limits.
* Experienced managing a bank branch with more than 200 transactions per day.

**Teller - Retail Banking 09/2009 - 08/2011**

Lakshmi Vilas Bank Limited (India)

[https://www.lvbank.com](about:blank)

* Opened and activated savings, chequing and deposit accounts.
* Issued, activated and resolved debit card, net banking and mobile banking services.
* Rented deposit boxes.
* Supported customer in several banking transactions.
* Managed cash transactions, currency evaluations and maintained cash balance register.
* Processed term deposits, drafts, pay orders, cheques and clearings as per authorized limits.
* Informed customers about current banking and latest financial products.

**Education**

**Ontario College Graduate Certificate course in Financial Services 2018 -2019**

Algonquin College, Ottawa, Ontario, Canada

**Master of Business Administrations (MBA) in Finance and Marketing 2007 - 2009**

ICFAI University, Dehradun India

(**Canadian equivalent assessed by World Education Services)**

**Bachelor of Commerce with Accounting 2004 - 2007**

Kurukshetra University, Kurukshetra India

(**Canadian equivalent assessed by World Education Services)**

**Awards**

* **Best Employee** **of the year 2017** by achieving target and best customer service
* Won Numerous Awards in monthly contests.