**Ken Manage**

**Customer Service │ Investment │ Aspiring XYZ**

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**Profile\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Motivated and result-oriented business student with a keen interest in financial analysis. Possesses outstanding organizational abilities and problem-solving skills as well as leadership capabilities. Values mentorship and continuously seek opportunities to learn, grow, and expand knowledge.

**Summary of Qualifications\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

* 4th-year student completing a degree in Finance from the Telfer School of Management
* X years of experience in the field of finance as an investment and marketing assistant
* In-depth knowledge related to advanced corporate finance, strategic management, fixed-income investments, equity evaluation, portfolio management, and business ethics
* Vice-President of the Finance Society and active member of the Entrepreneurs’ Club
* Excellent oral and written communication skills in both English and French

**Education\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Honours Bachelor of Commerce, with an option in Finance** Month year (Expected)

Telfer School of Management, University of Ottawa, Ontario

Project Experience

* **Investment Analysis**

Studied and monitored diverse investment opportunities to determine which ensured the best return and wrote a 20-page detailed report regarding the findings

* **Management Report**

Researched and analyzed Company XYZ to devise a plan to strengthen management capabilities and increase staff productivity

**Relevant Experience\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Investment and Marketing Assistant (Internship)**  Month year – Month year

The Investment Institute, Ottawa, Ontario

* Gained a solid understanding of various brokerage services and investment strategies through a rotational training program that included practical projects and shadowing
* Assisted 5 investment advisors in marketing new opportunities to over 40 existing clients
* Conducted extensive market research, added relevant information to client portfolios, and offered strategic recommendations to supervisor for future client meetings
* Commended by management for successfully trading on both the stock and bond markets

**Additional Experience\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_**

**Teaching Assistant** Month – Month year

University of Ottawa, Telfer School of Management, Ottawa, Ontario

* Marked assignments as well as in-class presentations for approximately 60 students
* Prepared motivating class lectures and arranged for guest speakers to enhance learning
* Provided ongoing feedback to students regarding term projects and exams

**Customer Service Specialist (part-time)** Month – Month year

The Computer Store, Ottawa, Ontario

* Demonstrated outstanding customer service skills while assisting clients with purchases
* Exceeded quotas by 10% while maintaining quality service in a fast‑paced environment
* Monitored inventory levels regularly and ordered supplies to ensure adequate stock
* Took the initiative to create a database to track client purchases and relevant sales data
* Designed and conducted a survey used to alter sales strategies and enhance customer satisfaction

**Extracurricular Experience\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_**

**Vice-President** Month – Month year

Telfer Finance Society, University of Ottawa, Ontario

* Managed a budget of $28,000 and increased the club’s annual funding by $6,000
* Overhauled and streamlined the organization’s financial data into a digitalized format for better record keeping and accountability

**Professional Skills\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Communication**

* Developed excellent oral and written communication skills while working in bilingual environments
* Demonstrated the ability to make engaging presentations in academic and professional settings
* Prepared detailed briefing notes for upper management related to quality control issues

**Leadership**

* Successfully coordinated large-scale events for 2 academic associations on campus
* Supervised a team of 15 volunteers and motivated members to exceed objectives  
  and expectations set by management
* Displayed initiative by recruiting an executive team to analyze group strengths and weaknesses and devise a plan to enhance team dynamics as well as the overall success of student club events

**Computer**

* Highly proficient at using Microsoft Excel, including solver, macros, vlookup, etc.
* Completed advanced level courses in MS Access, Java and HTML

**Awards and Achievements\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

* Young Entrepreneur of the Year Award year
* Jeux du Commerce: 2nd Place Finish – Stock Simulation Team year
* Bilingual Certificate, Glebe High School year

**Interests and Activities\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Sports: Soccer, football, biking, kayaking

Reading: Business and outdoor activity magazines

Travel: England, Ireland, Scotland, Eastern and Western Canada