**Penny Banks**

613-555-5488 |linkedin.com/in/banks | banks4432@uottawa.ca | 4432 Coin Road, Ottawa, ON K1N 3T5

**PROFILE AND QUALIFICATIONS**

Client-oriented Telfer School of Management student seeking a personal banking officer position with XYZ Bank. Solid foundation in finance and practical experience in the banking industry. Recognized by management as someone who demonstrates excellent communication skills as well as a personal approach while assisting customers.

* Solid track record in sales with proactive marketing and needs-based selling of financial products and services, including Visas, RRSPs, loans, investments, mortgages, financials reviews, etc.
* Knowledge of a wide variety of banking services and products gained through research and experience
* Trained in anti-money laundering detection/control and fraud investigation/resolution guidelines
* Fluently bilingual in French and English with working knowledge of Spanish
* Developed strong cultural awareness and sensitivity through international travel and experience

**RELEVANT FINANCIAL KNOWLEDGE**

* Successfully completed courses focused on corporate finance, fixed-income investments, portfolio management, international financial management, options and futures, and equity valuation
* Bloomberg Market Concepts Certification and FactSet Financial Modelling Certification
* Sound understanding of the securities industry: nearing completion of the Canadian Securities Course

**EDUCATION**

**Honours Bachelor of Commerce, with an option in Finance** *year - present*

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

* Expected graduation date: *month year*

**FINANCE RELATED WORK EXPERIENCE**

**Financial Customer Service Representative (part-time)** *year – year*

TD Canada Trust, Ottawa, Ontario

* Demonstrated excellent client service abilities while handling financial transactions such as deposits, withdrawals, bill payments, money orders and transfers, and foreign currency exchanges
* Consistently met quarterly sales objectives while accurately balancing a high volume of daily transactions using internal computer programs and verification systems
* Obtained and processed information required for the provision of services, such as opening accounts, establishing savings plans and purchasing bonds

**Billing Associate** *summer**year*

Enterprise Rent-a-Car, Ottawa, Ontario

* Gathered purchase orders, sales tickets and charge slips and compiled data related to major clients
* Prepared invoices, sales records, amounts due, credit terms, and dates of shipment
* Inputted credit memorandums to indicate returned or incorrectly billed merchandise
* Posted transactions to accounting records, such as worksheets and ledgers

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**ADDITIONAL WORK EXPERIENCE**

**Mail Clerk (part-time and summer)** *year*

Canada Revenue Agency, Ottawa, Ontario

* Displayed an ability to work efficiently under tight deadlines and with minimal supervision
* Sorted mail for hundreds of employees according to destination and type, such as returned letters, adjustments, bills, orders, and payments in order to facilitate the distribution process
* Examined outgoing mail for appearance and ensured envelopes were sealed by hand or machine
* Operated the folding machine that processed advertising literature, forms, letters, and other documents

**RECENT ACCOMPLISHMENTS**

* Recipient of the *Telfer School of Management Scholarship* for excellent academic standing
* Demonstrated excellent time management skills while juggling a full-time course load

and part-time employment

* Obtained a black belt in Taekwondo, demonstrating commitment and discipline

**VOLUNTEER EXPERIENCE**

**Environmental Conservationist** *year*

World Endeavours, Atenas, Costa Rica

* Addressed problems such as loss of biodiversity, deforestation, desertification, soil erosion,

overfishing, and pollution through community education and outreach programs

* Immersed into the Spanish language and Latin American culture during a two-month homestay

with a Costa-Rican family

**ADDITIONAL TRAINING AND QUALIFICATIONS**

* Canadian Securities Course, Canadian Securities Institute *expected completion date*
* Certificate in Bookkeeping and Accounting Practices, Algonquin College, Ottawa, ON *year*
* Web design courses, Algonquin College, Ottawa, Ontario *year*

**ACADEMIC CLUBS & INVOLVEMENT**

* Member of the Telfer Finance Society *year - present*
* Member of the uOttawa Sales Society *year - present*
* Participated in Jeux du Commerce *year*

 **LANGUAGES**

 **Reading Writing Oral Interaction**

* English Advanced Advanced Advanced
* French Advanced Advanced Advanced
* Spanish Intermediate Beginner Intermediate

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