

Financial services professional with experience spanning financial research, client engagement, communications, and data analysis. Skilled at translating complex information into clear insights, building strong stakeholder relationships, and supporting informed decision-making. Brings a foundation in capital markets, financial planning combined with client-focused service. Passionate about investments, market behaviour, and long-term wealth creation.

SKILLS

- Client Services and Financial Planning
- Financial compliance, Due Diligence
- Strong organization and time management
- Financial Research and Analysis
- Data Analysis and Visualization (Power BI)
- Data-driven decision making
- CRM Tools (MailChimp, Snap Projections)
- MS Office (Word, Excel, PowerPoint)

WORK EXPERIENCE

- **Guest Experience Team Member – Impact Kitchen, Toronto** **Apr 2025 – Apr 2026**
 - Delivered **consistent, client-focused service** in a fast-paced environment, ensuring positive guest experiences
 - Built strong relationships with guests through **proactive communication and personalized service**
 - Maintained precision in order management and transaction handling, balancing speed with attention to detail
 - Supported daily operations by collaborating across teams and **optimizing service flow under pressure**
- **Insurance Administrative Assistant (Co-op) – WhiteHorse Financial, Mississauga** **Nov 2023 – Feb 2024**
 - Developed a comprehensive marketing newsletter to **enhance lead generation**, engagement and client education
 - Conducted **data-driven research to analyze client needs** and recommend tailored, suitable insurance solutions
 - Maintained knowledge of financial products, market trends, and regulations to **support client recommendations**
 - Assisted in client communications and outreach by supporting engagement initiatives
- **Communications Ambassador – Humber College, Toronto** **Oct 2022 – June 2023**
 - Developed targeted email campaigns to engage stakeholders, **driving participation using data analytics**
 - Utilized engagement data to create and manage visual content across digital and print media platforms
 - Co-ordinated with Marketing Strategy Team and IT vendors representing the campus' operational needs
 - **Improved project turnover time by 30%** by introducing and implementing a collaborative task-management tool
- **Finance Intern - Motilal Oswal Financial Services Ltd., Mumbai** **May 2019 – July 2019**
 - Conducted **financial research and analysis** to support investment recommendations and client discussions
 - Supported advisors in **assessing client needs, uncovering new opportunities** and developing tailored solutions
 - Supported Financial Advisors in equity and debt strategies with detailed research and financial analysis projects
 - Analyzed financial statements, created reports, and provided holistic **client-specific investment advice** consistently
- **Freelance Photographer and Editor – Self-Employed** **June 2017 – Present**
 - Managed multiple projects with deadlines, demonstrating adaptability, organization and a result-oriented approach
 - **Built and maintained long-term client relationships** through proactive engagement and high-quality deliverables
 - Leveraged communication and client trust to **secure new clients and repeat business opportunities**
 - Developed a reputation for reliability and professionalism amongst a diverse clientele

EDUCATION & CERTIFICATIONS

- **Canadian Securities Course (CSC)** **Nov 2024**
- **Financial Planning, Humber College, Toronto, ON** **Apr 2024**
 - Risk Management and Insurance, Retirement Planning, Estate Planning, Consumer Credit
- **Professional Financial Services, Fanshawe College, London, ON** **Apr 2022**
 - Financial Business Development, Financial Planning Foundations, Marketing
- **Bachelor of Business Administration (Finance), NMIMS University** **Apr 2020**
 - Financial Statement Analysis, Investment Analysis and Portfolio Management, Derivatives