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# CHARLES XAVIER

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613-727-4723 | [xavi135@algonquinlive.com](mailto:xavi135@algonquinlive.com) | [www.linkedin.com/in/charlesxavier](http://www.linkedin.com/in/charlesxavier)

## PROFILE

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Strategic Business Administration-Finance student with hands-on training in financial analysis, investment strategies, and corporate finance. Adept at leveraging analytical skills to make data-driven decisions that optimize financial performance. Proven ability to work collaboratively in team environments and communicate complex financial concepts to diverse stakeholders.

## SKILLS

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- Process, prepare and present financial records in compliance with relevant policies, procedures and regulations.
- Perform financial analysis, developing financial plans and promoting products and services that are personalized to a client's needs
- Offer client-centered advice on investing, credit processes, and other banking solutions
- Ability to identify, assess, and mitigate financial risk
- Use persuasive communication to build customer trust and understand client motivators
- Advise on wealth management as well as retirement and tax planning
- Detail-oriented and analytical thinker, identifies innovative solutions for budget issues
- Skilled in using Microsoft Office applications (Word, Excel and PowerPoint and Outlook)

## EDUCATION

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### Business Administration - Finance Diploma

Sept 2021 – Present

Algonquin College, Ottawa, ON

- Dean's List: GPA: 3.7/4.0

### Ontario Secondary School Diploma

June 2021

St. Mark Catholic High School, Manotick, Ontario

## RELATED EXPERIENCE

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### Financial Analysis and Investment Strategy Project

Sept 2022 – Present

Algonquin College, Ottawa, ON

- Collected and analyzed financial statements, including income statements, balance sheets, and cash flow statements.
- Calculated key financial ratios such as profitability, liquidity, and solvency ratios to assess the company's financial health.
- Developed a detailed investment strategy including recommendations for stock purchases, based on the financial analysis.
- Presented the analysis and investment strategy to a panel of faculty and peers, demonstrating a deep understanding of financial analysis and investment principles

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## Business Plan Project

May – Aug 2022

Algonquin College, Ottawa, ON

- Performed market research to identify business opportunities in the current economy
- Gathered and analyzed data on target audience and industry competition to determine a competitive advantage for business products and services
- Coordinated weekly team meetings to facilitate open communication with 4 teammates
- Developed a comprehensive business plan that includes operations, finances, marketing strategies and human resources

## OTHER EXPERIENCE

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### Cashier

May 2020 – Present

No Frills, Ottawa, ON

- Greet customers warmly and assist them with their purchases, delivering a positive, timely, and efficient customer experience
- Operate a POS system to accurately process cash and credit transactions, consistently balancing the till after each shift
- Address customer inquiries and resolve issues promptly, directing to relevant products or services to meet their needs
- Stock shelves and maintain inventory, ensuring product availability for customers
- Comply with all store policies and procedures to ensure a safe and secure environment

## VOLUNTEER EXPERIENCE

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### Treasurer

Jul 2022 – Present

Code Youth, Ottawa, ON

- Monitored the financial performance of the organization and reported to the Board on financial deviations and overall financial health
- Worked closely with the bookkeeper to prepare budgets and financial reports
- Provided financial analysis and advice to support decision-making processes
- Attended monthly virtual meetings to discuss financial matters and organizational goals

## CERTIFICATIONS & TRAINING

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### Qualified Associate Financial Planner (QAFP)

Jan 2022 – Present

The Canadian Institute of Financial Planning (CIFP)

### Canadian Securities Course (CSC)

Jan 2022 – Present

Canadian Securities Institute (CSI)