
CHARLES XAVIER

613-727-4723 | xavi135@algonquinlive.com | www.linkedin.com/in/charlesxavier

PROFILE

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

- 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

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

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

CHARLES XAVIER

613-727-4723 | xavi135@algonquinlive.com | www.linkedin.com/in/charlesxavier

Business Plan Project Algonquin College, Ottawa, ON

May – Aug 2022

- 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

Cashier No Frills, Ottawa, ON

May 2020 – Present

- 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

Treasurer Code Youth, Ottawa, ON

Jul 2022 – Present

- 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

Qualified Associate Financial Planner (QAFP) The Canadian Institute of Financial Planning (CIFP)

Jan 2022 – Present

Canadian Securities Course (CSC) Canadian Securities Institute (CSI)

Jan 2022 – Present