

# TONY STARK

Ottawa, ON | 613-727-4723

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## PROFILE

Self-motivated **Financial Services** student skilled in collecting and analyzing client data, financial statements, and business transactions to create customized financial plans. Able to apply knowledge of borrowing and investment products to recommend solutions that meet clients' financial needs. Proven sales and relationship building skills to build and retain loyal clients. *Key areas of expertise include:*

- Financial Planning
- Financial Statements
- Tax Planning
- Relationship Selling
- Retirement Planning
- Mutual Funds & Investments
- Budgeting
- Compliance & Risk Management

## SUMMARY OF QUALIFICATIONS

- Trained in a variety of financial advising strategies for tax management, wealth accumulation and retirement and estate planning.
- Adhere to professional, legislation, and ethical standards as well as client confidentiality.
- Strong listening skills to understand and gather client information to support financial planning.
- Effective communication skills in English and French to engage, persuade, and educate clients.
- Utilizes excellent problem solving and critical thinking skills to find realistic financial solutions.
- Contributes to the team goals and actively supports and collaborates with other team members.
- Computer proficiency in MS Office (Word, Excel, PowerPoint, Outlook) for data management.

## EDUCATION

### Graduate Certificate, Financial Services

Jan 2024 – Present

Algonquin College, Ottawa, ON

- GPA: 3.7/4.0

### Bachelor's degree, Commerce

June 2022

Carleton University, Ottawa, ON

## RELEVANT EXPERIENCE

### Financial Planning Case Study

September 2024 – Present

Financial Services Program – Algonquin College, Ottawa, ON

- Analyzed client's personal financial statements and interviewed client to understand financial preferences, risk aversion, and financial goals.
- Educated client on best practices for budgeting and money management to improve cash flow.
- Applied knowledge of investments, loan and credit applications, and banking products to create a financial plan to help client pay off debt and work towards saving for a major purchase.

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## RELEVANT EXPERIENCE CONTINUED

### Customer Service Representative

July 2024 – Present

Bank of Montreal, Ottawa, ON

- Deliver exceptional service to 40+ customers daily by providing advice, guidance and financial solutions that meet their needs and best interests.
- Process a variety of banking transactions with accuracy, ensuring a smooth customer experience while complying with applicable banking, risk, ethical, and privacy policies.
- Maintain current knowledge of banking products, practices, and trends to answer questions, provide recommendations, and make referrals to the sales team.
- Apply analytical thinking and problem-solving skills to resolve customer complaints, account issues and technical problems while ensuring professionalism and tact.

## OTHER WORK EXPERIENCE

### Cashier/Stock Clerk

February 2022 – June 2024

Bulk Barn, Ottawa, ON

- Exceeded customer expectations by offering a warm greeting, communicating promotions, answering questions, and directing to appropriate products that met their needs.
- Managed time effectively to handle a high volume of customers while also completing daily store duties and helping 6 team members.
- Ensured shelves and products were well stocked and organized for ease of access.
- Handled cash and credit transactions with accuracy, balancing the till consistently each shift.

## VOLUNTEER EXPERIENCE

### Event Assistant

May 2023 – August 2023

Ottawa Sport Council, Ottawa, ON

- Supported 3 different sporting events, demonstrating multi-tasking abilities to handle logistics and multiple tasks while ensuring a positive experience for attendees.
- Managed event registration and provided information to attendees through clear communication and direction.

## CERTIFICATIONS & TRAINING

### Canadian Securities Course (CSC)

January 2024 – Present

Canadian Securities Institute, Online

### Certified Financial Planner

January 2024 – Present

Canadian Institute of Financial Planning (CIFP), Online