

Khosro Shariatzadeh

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Summary

Banking Professional and Tax Auditor with over 11 years of experience in retail banking and tax audit and experience in customer service roles.

I have practical hands-on customer service experience and I combine effective communication skills with detailed product knowledge to deliver positive outcomes.

Languages: English, Farsi

Technical Skills: MS Word, Excel, Outlook.

Work Authorization: Permanent Resident of Canada

CANADIAN EMPLOYMENT HISTORY

Banking Advisor Intern

Royal Bank of Canada (RBC), Vaughan, ON

September 2022 – October 2023

- Provided knowledge and banking advice to clients by opening and applying personal banking products deposit account packages and credit products.
- Proactively contacted clients to provide solutions and services by discovering their banking needs.
- Referred clients to partners within the Advice Center, branch channel, or mobile advisors.
- Leveraged technology to deliver a memorable client experience, drive sales, and retain relationships.
- Provided technical coaching to client advisors for complex transactions.

Client Advisor

Royal Bank of Canada (RBC), Maple, ON

March 2022 - September 2022

- Served clients by delivering exceptional customer service through completing transactions, engaging in needs-based conversations, and communicating with clients throughout the branch.
- Identified needs and provided tailored financial advice and solutions to clients, when possible, at the point of first contact.
- Educated and assisted clients with using RBC digital capabilities for online and mobile banking services.
- resolved client concerns, where possible, at the first point of contact.
- Managed risks by adhering to compliance routines, processes, and controls to protect client and shareholder interests.
- Maintained relationships with partners and colleagues to work as one RBC team.

Store Manager

OPA of Greece, Maple, ON

February 2020 – November 2021

- Prepared staff work schedules each week; reported items and products needed by the store on weekly basis.
 - Delivered the best service to customers by responding to customers' needs and helping staff prepare customer orders; inspected all food items and areas in accordance with regulations; processed payments.
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FINANCE-RELATED EMPLOYMENT HISTORY

Tax Auditor

Tehran Province Tax Organization, Tehran, Iran

July 2009 – June 2018

- Increased provincial government's tax collection source base by 40% by identifying and capturing revenue-generating businesses failing to file mandatory tax returns.
- Examined financials and other accounting documents to assess the annual income tax returns of individuals and small and medium-sized businesses (with a maximum revenue of CAD \$100,000).

- Issued tax obligation notices to taxpayers; issued government tax compliance clearance certificates to individuals and corporations.
- Examined refund request applications from individuals and corporations for overpayment of taxes and determined amounts to be credited.
- Created and maintained tax files in the provincial government tax database for new individuals and corporations; trained new hires on the tax department's laws and regulations and audit policies and procedures.
- Prepared necessary tax reports for litigation matters contested in local tax courts (min. 10 cases/ year).

Bank Officer

Mellat Bank, Semnan, Iran

June 2007 – June 2009

- Reviewed letter of credit documents to determine compliance with internal banking policies and procedures; performed due diligence in order to set up and issue letters of credit (LCs).
- Examined the originality of commercial documents and issued necessary clearance permits.
- Opened day-to-day-banking, chequing, and savings accounts; sold and purchased foreign currency.
- Issued bank guarantees to companies and individuals to participate in commercial tenders.

EDUCATION AND CERTIFICATES

Canadian Investment Funds Course (CIFIC), IFSE Institute, Canada

2023

Master's degree (Major – Economics), Azad University, Iran

2011