

SARA ECHEVERRY MEDINA

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PROJECTS

CPABC Annual Case Competition

Jan. 2025

CPA BC

- Analyzed financial reports and KPIs of a Canadian company to identify inefficiencies and improve profitability.
- Identified operational inefficiencies and proposed data-driven recommendations to enhance profitability and financial sustainability.
- Developed and evaluated two strategic action plans by modeling forecasted financial outcomes, demonstrating a 40% improvement in projected profitability.

Housing Affordability Analysis – Data Visualization and Economic Analysis (ECON334)

Nov. 2024

Simon Fraser University

- Analyzed income and housing affordability trends across Canada using R.
- Conducted data cleaning and exploratory analysis on datasets from Statistics Canada and the Canadian Real Estate Association.
- Developed a Housing Affordability Index and regression models by analyzing income trends in relation to shelter costs, identifying key affordability factors, earning top mark.

Product Selection Report – Business Technology Management (BUS237)

Apr. 2024

Simon Fraser University

- Conducted profitability analysis to determine appropriate product mix for limited display space, maximizing potential contribution margins.
- Utilized Microsoft Excel and SQL to organize, analyze, and manage data for 2000 different products, based on profit margins and available space to maximize earnings.
- Developed a comprehensive report using Microsoft Word to present findings and actionable recommendations.

EXPERIENCE

Toronto Dominion Bank – Customer Experience Associate

Mar. 2025 - Present

- Identify customer needs and recommend appropriate financial solutions, including savings accounts, credit cards, and digital banking tools.
- Greet and assist clients in-person, over the phone, and digitally with banking transactions and inquiries, while offering personalized service.
- Investigate and address customer concerns or transaction discrepancies with professionalism and care.

Holt Renfrew – E-commerce Representative

Oct. 2022 – Mar. 2025

- Resolved customer issues by efficiently addressing over 50 client inquiries weekly, identifying solutions to meet their needs, ensuring high satisfaction and retention rates.
- Investigated and mitigated suspicious activities by analyzing transaction patterns and identifying anomalies, effectively minimizing potential risks to the platform and ensuring compliance with protocols.
- Coordinated a team of 10 online sales associates by prioritizing tasks based on needs and workflow, leading to a 15% increase in operational efficiency and improved team performance.

Simon Fraser University – Teaching Assistant

Jan. – Apr. 2024

- Assisted and delivered Sustainable Business by planning lessons, grading assignments, and mentoring students.
- Developed and delivered a 40-minute lesson on sustainability and business ethics, encouraging active participation from a class of 60 students.
- Provided constructive feedback to student teams on project presentations and research, enhancing the quality of their work.

Sole proprietorship – Rental Property Management

Aug. 2020 – Jul. 2024

- Managed a portfolio of five rental properties, ensuring smooth operations, tenant satisfaction, and financial oversight.
- Developed comprehensive spreadsheets to track rental income, property expenses, and budget allocations, improving financial management and optimizing budget decisions across multiple properties.
- Handled all financial transactions, including rent collection, utility payments, and vendor invoices, ensuring timely and accurate processing.

EDUCATION

Simon Fraser University

Sept. 2022 – Present

Bachelor of Arts in Economics, Minor in Business Administration

- **Relevant Coursework:** Business Analytics, Applied Econometrics, Business Technology management, Managerial Accounting and Financial Accounting
- **Deans Honour Roll** 2nd year; 3.5 GPA

QUALIFICATIONS

- **Data Analytics:** Advanced knowledge in SQL, R, Access and Excel for data manipulation, analysis, and visualization.
- **Languages:** Proficient in English and Spanish.