**KARYN MCWILLIAMS**

**HIGHLIGHTS OF QUALIFICATIONS**

**569 Broadview Ave #B3, Toronto Ontario M4K 2N8**

**Cell # 416-520-3115**

* Extensive experience in financial industry and customer relations in challenging roles, including call center experience answering and servicing client accounts, new account openings, project support, training and researching client issues at a brokerage firm
* Ability servicing high net worth clients in the automobile industry as a point of contact
* Excellent communication skills, strong work ethic & ability to take tasks from start to end
* Contributed to successful sales and customer retention strategies, as well as employee training
* Able to work with different groups within the company with differing opinions and targets
* Remarkable ability to negotiate and diplomatically solve customer service issues with good discretion and judgement
* Experience with Events Management Planning through York University

**WORK EXPERIENCE**

**Federal Campaign Assistant (P/T),** 2019-Present

* Worked canvassing and offering assistance to elected Representative
* Supported duties as assigned ongoing throughout the election process
* Retuning Officer for 2019 Federal Election

**Client Support, Documentation and Research**, Valeo Concierge**,** 2012-2018*,*

* Designed client presentation packages for specialty and vintage car sales
* Efficiently assisted in budgeting, planning and delivering documentation to clients
* Contributed in acquiring new business and maintaining client relationships
* Sourced new business relationships for private dealer

**Sales Agent,** Anthropologie (Seasonal) 2016-2017

* Assisted customers with sales and purchases of retail clothing store
* Provided excellent care and guidance in customer purchases

**Analyst*,*** TD, TD Counterpart Credit, Apr-May 2016,

* Researched and documented outstanding client accounts for Foreign Account Tax Compliance Act (FATCA) on behalf of Investment Advisors and account holders

**Domestic Stay at Home Children’s Caretaker**, 1999-2012

* Administered personal care for children
* Household budgeting
* Performed routine housekeeping duties
* Prepared meals and served them, as required

**KARYN MCWILLIAMS** [karyn.mcwilliams@gmail.com](mailto:Karyn.McWilliams@gmail.com) / 416-520-3115 Page 2

**Product &Project Support, Sr. Customer Service Officer,** Canada Trust Securities, 1995-1999

* Provided support and communication for new and existing products and services delivered by retail brokerage and Canada Trust in a call center setting
* Assisted in co-ordination of special project delivery and company initiatives (new account procedures and on-line application process)
* Trained new and existing staff on brokerage and retail systems at high volume call center
* Effectively handled and managed high volume of customer enquiries and concerns
* Acted as senior resource contact for retail brokerage enquiries
* Effectively met customer investment needs by providing current market information, opening new accounts and placing trading orders

**Sales and Marketing Representative,** Midland Walwyn Capital Inc., 1994-1995

* Organized branch seminars & provided mutual fund marketing information to financial advisors
* Liaison between mutual fund companies and branch sales staff of full service brokerage Provided administrative support to financial advisors

**Customer Service & Sales,** TD Bank**,** 1987-1994

* Consistently met personal sales targets in retail bank through successful identification of customer needs and requirement of banking products and services
* Participated in successful branch campaigns to build client base
* Created relationships with personal and corporate clients to retain business relationships
* Identified potential sales referrals i.e. mortgage and loan prospects

**OTHER ACTIVITIES**

* Participated in 2019 Federal political campaign, canvassing & assisting an elected representative
* Working towards Floral Certification through Toronto Botanical Gardens Society (2019-ongoing)
* Involvement with various community and school related activities-fundraising, leader of group with Mothers Network of Toronto, Brownie Leader, Meals on Wheels, Animal Shelter Volunteer

**EDUCATION / PROFESSIONAL DEVELOPMENT**

**Paralegal Studies,** Business Law, George Brown, Toronto, ON, 2018

**Honors Bachelors of Environmental Studies, School of Urban and Regional Planning**, U. of Waterloo, 1994

**Event Management Planning Certificate**, York University, Toronto, ON, 2014

**Women’s Initiative Back to Work Program,** University of Toronto, Toronto, ON, Sept-Dec 2012

**Canadian Securities Course**, Conducts and Practices Handbook, 1995

**Canadian Bankers Mutual Funds** **in Canada**, 1994

**Co-operative Program**, Oxford Polytechnic, Oxford University, England , 1992

**Ontario Bilingualism Certificate**, Agincourt Collegiate, 1989

**REFERENCES AVAILABLE UPON REQUEST**