

MANTHAN PATEL

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Client-centric and results-driven professional with 2+ years of success in customer service, financial conversations, and consultative sales across retail and automotive industries. Experienced in building long-term relationships, developing personalized solutions, and guiding clients toward informed financial decisions. Known for reliability, independence, and a strong desire to help others succeed financially. Eager to grow as a **Financial Advisor** by contributing to Sun Life's mission of making communities financially stronger.

CORE COMPETENCIES

- **Financial Planning Basics & Roadmapping**
- **Insurance & Investment Product Awareness**
- **Goal-Based Client Advising**
- **Client Prospecting & Needs Analysis**
- **Sales & Relationship Development**
- **Conflict Resolution & Customer Retention**
- **Team Leadership & Staff Mentoring**
- **CRM Tools: CDK Drive, Microsoft 365, POS**
- **LLQP / Mutual Fund License (open to learn)**

WORK EXPERIENCE

Koepple Companies(Five Guys), Halifax - Shift Manager **Mar 2025 - Present**

- Trained and onboarded 10+ new hires on Five Guys' food preparation and customer service protocols, ensuring consistent quality and service standards across all shifts managed.
- Managed daily operations including staffing, inventory, cash flow, and customer satisfaction metrics.
- Resolved client concerns efficiently, ensuring long-term loyalty and referrals.
- Maintained team morale and trust while improving speed and quality of service by 12%.

Sterling Honda, Hamilton - Service Advisor **May 2024 - Jun 2025**

- Assisted 20+ clients daily with vehicle service plans—explaining costs and recommending service packages that met individual needs.
- Achieved 22% increase in maintenance package sales through goal-based conversations.
- Coordinated with technical staff to ensure on-time delivery and follow-through, enhancing client trust.
- Initiated referral-driven programs and supported follow-up appointments to retain long-term customers.

B Town Autos Tricity, Kitchener - Sales Consultant(Part-time) **May 2023 - Apr 2024**

- Worked as a trusted advisor to clients by assessing lifestyle and budget to recommend financing and vehicle solutions.
- Consistently exceeded monthly targets (7–10 sales/month) through personalized service and relationship nurturing.
- Facilitated vehicle financing discussions, explaining repayment terms, down payments, and options—building financial literacy among clients.
- Leveraged networking and referrals to drive consistent lead generation.

EDUCATION

Postgraduate in Web Development, Conestoga College, Kitchener, ON, **GPA:3.8/4.0** **Aug 2024**

Bachelors of Computer Engineering, Gujarat Technological University, India, **GPA:3.73/4.0** **Jun 2021**

LEADERSHIP SKILLS & AWARDS

- “Shift Star of the Month” – Five Guys (Team Leadership & Customer Satisfaction)
- Youth Parliament of India Delegate (2018) – Represented college nationally
- Student Leader – CSI & GDSC Waterloo Events (Event planning & technical team lead)

INTERESTS

- Personal finance, leadership development, client advisory, continuous learning, financial literacy advocacy
- Committed to Sun Life's Training & Development Path