

MANTHAN PATEL

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Motivated and client-focused professional with 2+ years of experience in financial conversations, consultative sales, and goal-based advising. Skilled in building strong client relationships, delivering personalized service, and deepening trust through proactive financial guidance. Adept at identifying client priorities and connecting them with tailored solutions—ranging from investment and credit support to digital banking tools. Eager to contribute as an **Associate Financial Advisor** at CIBC by helping individuals and small business clients achieve their long-term financial goals.

CORE COMPETENCIES

- **Financial Needs Assessment & Personalized Planning**
- **Credit & Investment Solution Awareness**
- **Client Onboarding & Relationship Building**
- **Retail Banking & Business Banking Exposure**
- **Community Outreach & Business Development**
- **Referral & Networking Strategy**
- **Conflict Resolution & Client Retention**
- **CRM & Banking Systems: CDK, Microsoft 365, POS**
- **Mobile & Online Banking Tools Support**
- **LLQP / CIRO-MFD License: Eligible & open to complete**

WORK EXPERIENCE

Koepple Companies(Five Guys), Halifax - Shift Manager

Mar 2025 - Present

- Managed store operations and led a 10+ person team to ensure high-quality service delivery.
- Resolved client concerns professionally and ensured positive customer experiences.
- Developed team trust, resulting in higher retention and improved customer service metrics.
- Supported daily operations: cash handling, staffing schedules, and workflow efficiency (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)

CAREER INTERESTS

- Personal finance, banking innovation, relationship advising, leadership development
- Committed to Sun Life’s Training & Development Path