

Nicholas Patano
19 Marlisa Dr. Orillia ON, L3V 6Z5
E-mail: nicholaspatano@gmail.com
Phone: (705) 329-7158

EMPLOYMENT HISTORY

eCapital Freight Factoring Inc.

December 2019 – Present

Account Manager

- Day to day client account management
- Responsible for customer funding deadlines
- Provided excellent customer service by addressing client inquiries
- Worked with other departments to develop customer relations
- Reviewed client documentation and log customer funding data

Scotiabank

May 2018 – November 2019

Financial Advisor

- Developed personalized financial plans
- Built strong, long-standing customer relationships
- Educated clients, providing relevant insights and expert advice
- Q2 Advice Excellence 2nd Place Mutual Funds Sales in Ontario Region
- Q3 Advice Excellence 6th Place Mutual Funds Sales in Ontario Region
- Q4 Advice Excellence 4th Place Mutual Funds Sales in Ontario Region

Meridian Credit Union

October 2017 – May 2018

Member Service Representative

- Day to Day Teller Transactions
- ABM Balancing
- MSR End of day quality control

Agenda Freeski Ltd.

May 2016 - October 2017

Co-Founder / Freeski Coach

- Coached various Freestyle Skiing Skills in various environments
- Created various training templates for athletes
- Planned Training Camps for athletes

RELATED EXPERIENCE

President of Ski and Snowboard Club at Lakehead University

2013 - 2015

- Organized, planned and marketed for events

Board Member of Student Centre Committee

2014 - 2015

- Expanded campus for future student opportunities

EDUCATION

Georgian College

2016 - 2017

- Business Administration Marketing Diploma

Lakehead University

2011 - 2015

- Honours BSc with Specialization in Psychology

CERTIFICATIONS

- IFIC Mutual Funds Licensed
- Registered Financial And Retirement Advisor - Part 1 Accreditation
- Emergency First Aid Certification

REFERENCES

Available upon request