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Focusing on Family and Business

- Digi3 Canada



- Gujarat University

Vernon, British Columbia, Canada · [Contact info](#)**500+ connections**

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- Service Childcare Industry for Last Five Years
- Over Fifteen Years of Experience In Financial Service Industry (Retail and Commercial Banking)
- Funded over \$250 Million of commercial loans...

[...see more](#)**Activity****594 followers**[Create a post](#)

Umang Patel PFP® BCom commented on a post · 1mo

Congratulations Michael!!!!

Umang Patel PFP® BCom commented on a post · 2mo

Congratulations Michael, Wish you all the best.

Umang Patel PFP® BCom commented on a post · 3mo

Congratulations team!!!! Well deserved and Proud always.

Show all comments →

Experience



Father and Business Owner

Digi3 Canada · Permanent Full-time  
Sep 2024 - Present · 1 yr  
Vernon, British Columbia, Canada · Remote



Senior Commercial Banking Advisor

Valley First, a division of First West Credit Union · Permanent Full-time  
Nov 2020 - Sep 2024 · 3 yrs 11 mos  
Vernon, British Columbia, Canada

Helping community business owners achieve success. Serving commercial clients with complex financial needs than usual. [...see more](#)



Commercial Account Manager (Diversified Industries)

RBC  
Sep 2015 - Oct 2020 · 5 yrs 2 mos  
Polson Place Mall, 2306 BC-6, Vernon, BC V1T 7E3

Helping business owners achieve what matter most to them. Serving commercial clients with complex financials needs than usual. [...see more](#)



CIBC Imperial Service

3 yrs 8 mos

Financial Advisor - CIBC Imperial Service

May 2014 - Aug 2015 · 1 yr 4 mos  
Esteran

I help my clients to achieve what matters most to them. I bring the complete holistic financial planning approach to the table, to [...see more](#)

Senior Financial Service Representative (Investment)

Full-time  
Feb 2013 - May 2014 · 1 yr 4 mos  
Esteran, Saskatchewan, Canada

+Acting Branch Manager during his/her absence  
+Exceptional experience in secure lending - more than 6 milli [...see more](#)

Financial Service Representative

Full-time  
Jan 2012 - Jan 2013 · 1 yr 1 mo  
Esteran, Saskatchewan

+ Acting Branch Manager during his/her absence  
+ Proactively engage with clients in all areas the branch unco [...see more](#)

Customer Service Representative (ESSO)

Reliance Fuel Inc  
Aug 2010 - Oct 2011 · 1 yr 3 mos  
Toronto, Canada Area

•Manage day to day cash transactions.  
•Attend to customer questions, complaints and concerns imn [...see more](#)

Education



**Gujarat University**  
Bachelor of Commerce (BCom), Accounting and Finance  
2005 - 2008



**Centennial College**  
Post-secondary program, Business - Finance  
2010 - 2011  
Activities and societies: Mutual Fund Certificate, CSC (Canadian Securities Course)  
Centennial College Investment Club

Licenses & certifications



**PFSA (Personal Financial Service Advise)**  
Canadian Securities Institute  
Issued Jul 2013



**CSC ( Canadian Securities Course )**  
Canadian Securities Institute  
Issued Dec 2010  
Credential ID 737009

Show all 4 licenses & certifications →

Volunteering



**Donor**  
The Salvation Army  
Social Services



**Donor**  
United Way Toronto  
Social Services

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Skills



Banking



Endorsed by Diego Torres who is highly skilled at this



Endorsed by 4 colleagues at RBC



31 endorsements

Investments



Endorsed by 2 colleagues at RBC



23 endorsements

Show all 30 skills →

Recommendations



Received

Given

**Kiran Parmar Mookerjee, MBA, CFP®, PFP®** · 1st

Financial Planner at TD Wealth Financial Planning

February 11, 2017, Kiran Parmar worked with Umang on the same team

Umang Patel has been my co-worker at CIBC. He is a thoroughly professional financial advisor. Always willing to help and share product and process knowledge. He is friendly to everyone and very good listener. It has been a great pleasure to work with him .

**Bhavik Patel, PFP** · 1st

Investment Specialist &amp; Financial Planner

May 25, 2015, Bhavik and Umang studied together

Umang is a very smart and talented Financial Advisor. I helped him study for the PFP designation. I found that Umang learns very quickly, picks up on very fine details, and has an excellent understanding of Investment strategies how taxes relate to them, asset location strategies. He is an absolute wizard at financial calculations and explaining them. His clients are lucky to have him advise them.

[Show all 4 received →](#)**Courses****Applied Financial Planning 1 and 2**

Associated with CIBC Imperial Service

**Canadian Securities Course**

Associated with CIBC Imperial Service

[Show all 7 courses →](#)**Honors & awards****CIBC Top performer club**

Issued by CIBC · Jul 2014



Associated with CIBC Imperial Service

**Award for Service Excellence**

Issued by CIBC · Jan 2014



Associated with CIBC Imperial Service

[Show all 6 honors & awards →](#)**Languages****English**

Professional working proficiency

**Gujarati**

Native or bilingual proficiency

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