

SHIVA KAKKAR

Halifax, NS • (437)388-1384 • Kakkarshiva.sk@gmail.com
<https://www.linkedin.com/in/shiva-kakkar-ns/>

HIGHLIGHTS OF QUALIFICATIONS

- Bilingual: Fluent in English, Punjabi, and Hindi
- Proficient in Microsoft Office, Power BI and Intralink developed through academic and proven work experience in financial services, call centre environment.
- Solid experience in Business Development and Customer Relationship Management in different regions of Canada- Ontario, New Brunswick, Nova Scotia
- Have sound knowledge of regulatory and compliance requirements that include, Anti-Money Laundering and Terrorist Financing Reporting requirements, FCAC consumer provision requirements, and Privacy Act provisions in accordance with Bank Policies & Procedures. • Fully licensed driver (Class 5) from Govt. of NS

EDUCATION AND TRAINING

Sobey School of Business at Saint Mary's University

- Transferred College Credits for earning University Credential
- Bachelor of Commerce- Finance Majors

Ontario College Diploma, Business Program

Lambton College In Toronto, North York, ON

- Achieved Co-curricular Record through Student Council, Tutoring Centre, Program Advisory Committee.
- Completed all program requirements with special emphasis to **Finance and Business Management**.

Volunteer Experience

Treasurer

SMU Debate Society, Saint Marys' University

September 2023- September 2024

- Managed the society's budget, ensuring financial stability and transparency.
- Oversaw fundraising efforts and allocated funds for events and competitions.
- Maintained accurate financial records and prepared regular reports for members.

Special Events Coordinator

Halifax Hindu Temple, Halifax, NS

September 2022- September 2023

- Organized and coordinated cultural and religious events, ensuring smooth execution and community engagement.
- Managed event logistics, including scheduling, volunteer coordination, and vendor arrangements.
- Promoted events through various communication channels, increasing attendance and participation.

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WORK EXPERIENCE

Registration officer/Poll Clerk

Elections Canada

September 2024

- Set up and organized polling place materials, registration desks, and informational posters to ensure a seamless voting process.
- Verified electors' identity and address, enforced ID policies, and guided them through the registration process.
- Registered new electors, updated information, and completed certificates and declarations for vouching.
- Ensured compliance with electoral regulations, including monitoring candidate representatives.
- Assisted with ballot counting on election night, ensuring accuracy and transparency

Client Solutions Advisor

March 2022- September 2023

Scotiabank Canada

Mortgage Onboarding Team Scotiabank
Canada,
Halifax/Dartmouth Cluster, NS

- Advised over 500+ mortgage clients annually on financial strategies and product mixes, contributing to a 20% growth in the mortgage portfolio year over year.
- Promoted real estate lending and insurance products, achieving a 120-130% performance on quarterly sales targets and earning recognition as a top performer within the team.
- Managed and valued real estate portfolios worth \$30M+ for clients, supporting investment strategies and asset management outcomes.
- Facilitated referrals for 50+ clients monthly to banking partners for lending and investment needs, enhancing service offerings and driving a 25% increase in cross-departmental revenue.
- Managed a diverse client base of 500-600 mortgage clients across 4-10 branches within the Halifax Regional Municipality (HRM), contributing to regional business growth by achieving a 15% year-over-year increase in client retention.

Customer Solutions Advisor

Sept 2023- Present

Scotiabank Canada

Atlantic Contact Centre Halifax,
NS

- Connected with over 100+ customers daily via telephone, delivering personalized experiences and championing the Scotiabank brand, resulting in a 95% customer satisfaction score.
- Promoted retail banking products in line with Scotiabank's Values, Code of Conduct, and Global Sales Principles, ensuring compliance with operational standards and contributing to a 30% increase in product cross-sales over six months.
- Resolved 90% of customer issues on the first call, effectively troubleshooting and multitasking across multiple system interfaces in a fast-paced call center environment.