Ankita Satkar

FINANCIAL SERVICES REPRESENTATIVE – Relationship Management, CRM & Sales Techniques

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SKILLS

- **Financial Services**: Conduct needs analysis, suggest investments, assess risk, and ensure KYC, AML, FATCA.
- **Sales & Financial Products**: Apply sales techniques to cross-sell financial instruments per client profile.
- **CRM Tools**: Use Salesforce and Wealthbox to manage client records, log interactions, and track opportunities.
- **Data Entry & Reporting**: Maintain client databases, prepare financial logs, and create account summaries.

WORK EXPERIENCE

Store Associate — **February 2025 – Present**
Marshalls & Homesense — *Calgary*

- Served over 90 customers per shift, resolving queries across billing, exchanges, item sections to reduce queue wait time by 25% while improving satisfaction through faster checkout completion using optimized store navigation.
- Restocked 300+ items daily, verified 100% of inventory against logs, checked 600+ barcodes to ensure accuracy, with final tallies kept within 2% mismatch limits across morning and evening audits conducted every week.
- Reviewed register logs, resolved 15+ payment mismatches weekly, tracked receipts, confirmed price tags across 8 aisles, supporting full store cycle operations without triggering inventory-related supervisor escalation forms.
- Balanced daily cash register counts with system billing totals, ensuring records matched without mismatch alerts.

Store Associate — **August 2023 – February 2025**
Winners & Homesense — *Vancouver*

- Processed 200+ transactions per week, assisted 1,000+ customers monthly, and performed aisle resets across 12 categories, replacing 1,500 labels and rotating goods based on expiry indicators and product movement reports.
- Answered 20+ billing desk queries per day, retrieved 300+ stock items weekly, and fulfilled 90% of same-day purchases without delay using accurate department tags, updated shelf display maps, and scanned pricing labels.
- Updated digital stock forms, confirmed physical layout with barcode checks, decreased look-up delays by 30% during busy weekend hours, supporting both morning and night teams per shift across 6 overlapping schedules.
- Managed daily item refills by schedule, restocking each shelf based on product type, zone, and rotation plan.

Business Development Executive — **August 2020 – September 2023**
Rain Financial Services — *India*

- Managed 120+ portfolios with investments, matched instruments to risk scores, and grew deposits by INR 1.6M in one fiscal year through income-based strategy planning and recurring quarterly review with client-side reports.
- Created 50+ monthly sales forecasts from CRM logs, tracked INR 5M in client payments, refined daily follow-up windows, and compiled lead conversion data into structured monthly Excel reports validated by audit teams.
- Conducted 200+ consultations across 30 months, reviewed INR 50K–5L income brackets, and offered plans using taxation insights, statements, and eligibility filters sourced from national compliance portals and firm templates.
- Sent 100+ CRM updates weekly to clients, tracking responses, follow-ups, and account status changes daily.

Sales Support Executive — **November 2017 – June 2020**
Sharekhan by BNP Paribas — *India*

- Verified 500+ client KYC documents, cross-checked 1,000+ PAN entries, and processed 250+ demat activations through portal entry by ensuring zero data mismatch between scanned forms, address IDs, and record dashboards.
- Audited 150+ CRM entries monthly for update gaps, created 12 compliance summaries quarterly, and ensured all regulation coverage by pushing full accurate onboarding data updates for flagged accounts across 3 branches.
- Logged 1,000+ client help tickets in Excel, routed 80+ flagged cases to senior support teams, and maintained daily team issue logs with precise timestamps for each escalated entry across 4 systems and manual record files.
- Tested 2 applications using real client data sets, documented all errors, and verified fixes before deployment.

EDUCATION

Master of Business Administration — April 2023 – January 2025
University Canada West, Vancouver, Canada

Master of Commerce — May 2020 – June 2021
University of Mumbai, India

Bachelor of Commerce — May 2014 – June 2017
University of Mumbai, India

CERTIFICATIONS AND ACCOMPLISHMENTS

- **Financial Accounting Micro-Credential Workshop** – University Canada West
- **Digital Marketing Associate** – DMI (University Canada West)
- **Top Performer, Client Acquisition & Revenue Growth** – Rain Financial Services
- **100% Compliance Award for Documentation Accuracy** – Rain Financial Services