

# KABIR ASHISH ITWALA

BANKING ADVISOR - Financial Analysis, Banking Operations & Client Relations

✉ [kabiritwala@gmail.com](mailto:kabiritwala@gmail.com) ☎ +1 (705)-978-5540 📍 North Bay, Canada in [LinkedIn](#)

## SKILLS

---

- **Financial & Banking Operations:** Cash Handling, Transaction Accuracy, Compliance Adherence.
- **Customer Engagement & Sales Strategy:** Customer Onboarding, Upselling Credit & Financial Products.
- **Analytical & Reporting Tools:** Financial Modeling, Comparative Company Analysis, Report Drafting.
- **Technical Proficiency & Data Management:** Microsoft Excel, Word, Data Cleaning, Data Visualization.
- **Privacy & Security Protocols:** Secure Client Data, Confidentiality, Risk Mitigation, Loss Prevention.

## WORK EXPERIENCE

---

### Store Associate

October 2024 - Present

Circle K

North Bay, ON

- Processed 1,100+ monthly POS transactions with 99.8% billing accuracy, ensuring efficient customer checkout and payment reliability.
- Reconciled daily cash drawers averaging \$4,000+ in transactions, maintaining zero financial discrepancies across 6+ consecutive months.
- Delivered personalized customer assistance to 70+ shoppers per shift, improving service efficiency and repeat customer engagement.
- Investigated and resolved 18+ weekly customer billing and product inquiries, maintaining service satisfaction scores above 95%.
- Executed inventory verification audits for 150+ SKUs weekly, supporting accurate stock reconciliation and financial reporting.
- Assessed retail loss prevention procedures, reducing shrinkage by 20% and safeguarding store revenue integrity.
- Coordinated payment processing across debit, credit, mobile wallet, and prepaid transactions, improving payment turnaround time by 12%.
- Maintained compliance with cash handling, refund authorization, and financial control procedures, supporting audit readiness and operational transparency.

### Field Marketing Representative

June 2024 - September 2024

Kognitive Sales Solutions

North Bay, ON

- Promoted the Canadian Tire Triangle Mastercard through personalized, needs-based financial consultations with 40+ customers daily.
- Educated 100+ customers on credit card reward structures, interest policies, and financial benefits, improving product awareness and purchase confidence.
- Increased credit card application conversions by approximately 20-25% through customer-focused sales engagement and relationship-building strategies.
- Guided 100+ applicants through onboarding and eligibility verification processes, ensuring accurate completion of financial applications.
- Maintained secure handling of confidential customer financial data, achieving 100% compliance with privacy and data protection regulations.
- Delivered 250+ product demonstrations across retail locations, strengthening brand visibility and customer engagement.
- Documented customer interactions and tracked application progress using CRM reporting tools, improving lead follow-up accuracy by 22%.
- Collaborated with 10+ sales supervisors to refine promotional messaging and pitch strategies, contributing to improved team performance metrics.

## EDUCATION

---

### Post-Baccalaureate Diploma - Finance

January 2024 - December 2025

Nipissing University, North Bay, Canada

### Bachelor of Commerce - Accounting & Finance

June 2019 - November 2022

Maharaja Sayajirao University, Vadodara, India

### CA Foundation Level

November 2020

Institute of Chartered Accountants of India

## CERTIFICATIONS

---

- **City Investment Banking Job Simulation (Forage)** May 2024
- **Accenture Data Analytics & Visualization Simulation (Forage)** May 2024