



Katrianna Rynes

ASPIRING ACCOUNT EXECUTIVE

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Marketing & Social Media Strategies • Customer & Communications Focused

Soon-to-be marketing graduate and former banking professional leverages vibrant communication and relationship building skills to understand and address client needs and concerns. Contagiously enthusiastic and engaging in all endeavors. **Notable Strengths:**

Financial Services • Customer Needs Awareness • Social Media Public Relations • Business Development • Relationship Management
Written & Verbal Communication Skills • Customized Client Strategies
Presentations & Reports • Product & Service Knowledge • Team Support

10+ Years' Financial Services Industry Experience

Certificate in Marketing, Degree in Sociology

Dedication to Service, Sales, Knowledge, and Growth

EDUCATION & PROFESSIONAL DEVELOPMENT

Marketing Management Certificate (2017), GPA: 4.0
Harvard University, Cambridge, MA

Bachelor of Arts, Sociology (with honours)
York University, Toronto, ON

Independent and group project work included:

- Acted as Media Director for US launch of Japanese brand, delivering \$40M advertising campaign.
- Evaluated factors contributing to stagnant fund sales, creating market research project.
- Designed social media marketing strategy for new mutual fund launch.
- Prepared advertising concept and copy for mutual fund company.
- Wrote financial and technological sample press releases.

Related courses:

- Fundamentals of Public Relations • Brand Management • Integrated Marketing Communications
- New Media Marketing • Digital Marketing Mastery • Crisis Management and Communications
- Marketing Principles • Writing for Marketing and Advertising • Consumer Market Research
- Courses Completed at Toronto College: TV/Video Production • Broadcast Advertising

Chartered Investment Manager (CIM) • Personal Financial Planner (PFP) • Canadian Securities Course (CSC)

PROFESSIONAL EXPERIENCE

Asset Investments Canada – Toronto, ON

BUSINESS DEVELOPMENT MANAGER

Oversaw, as a 3-person team, millions in assets under management, **maintaining client relationships, identifying business requirements, and crafting sales pitches and product solutions** for opportunities in Ontario and Quebec. Facilitated and led sales pitches with prospective, existing, and dormant accounts, generating new business.

2013 – 2017

2016 Summary:

- 500 Clients
- \$591M AUM
- \$242M Gross Sales
- 130% Sales Increase

"A positive problem solver, Katrianna will rise to the top...She is focused and thrives in situations involving challenges." - Professor, Harvard University



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Page 2 • 416.555.1111 • katrianna.rynes@mail.com

Canadian National Bank – Toronto, ON

FINANCIAL PLANNER (2011 – 2013)

Provided financial advice to affluent clients on investment and credit solutions, **developing relationships with center of influences** (CIOs) and mortgage brokers. Navigated sales pipeline of prospective and existing clients, following up with customers. **Presented comprehensive reviews** of financial portfolios. Liaised with service partners, **designing solutions to secure new business**. Complied with policies, procedures, and regulatory requirements.

2009 – 2013

Role Summary:

200 Clients
\$83M AUM
AUM Growth in 8
Consecutive
Quarters

INVESTMENT & RETIREMENT PLANNER (2009 – 2011)

Marketed and prepared seminars to audiences on a variety of financial topics, including US real estate, psychology of investing, and identifying risk appetite. **Presented to best-ever attended seminar in branch history titled "Tax and Estate Planning," generating 25+ leads to exceed all previous results.** Customized portfolio solutions to clients, attracting new clients.

Role Summary:

\$10M in Net New
Investments
3x Growth in
2010

MacLeod Private Investment Advisors – Toronto, ON

ASSOCIATE INVESTMENT ADVISOR

Supported Investment Advisor to become one of the **top 10 teams nationally**, fulfilling administrative, client service, trading, and portfolio review tasks at full-service brokerage firm. Authored quarterly newsletters, **outlining business news and investment recommendations for client audience.**

2006 – 2009

Role Summary:

Ranked #1 in
Toronto
\$1.6M in
Production

Peters & Co. Limited – Calgary, AB

PRIVATE CLIENT SALES ASSISTANT

Updated existing, long-term client information, rejuvenating relationships within an oil & gas investment firm. Assisted investment broker, buying and selling stocks, bonds, and mutual funds.

2005 – 2006

COMMUNITY INVOLVEMENT

Hope and Healing Mental Health Advocates – Calgary, AB

VICE PRESIDENT, MARKETING

Launched, together with President and board members, not-for-profit organization aiming to **empower healthy minds through prevention, education, and community outreach.** Research resources for treatment, therapy, and self-help. Define needs of four target segments: the workplace, seniors, children/youth, and immigrants. **Create presentations and workshops** for target groups, providing resources ahead of official launch in September 2017.

2016 – Present

Role Summary:

Brand Development
and Awareness
Marketing
Social Media
Event Planning

New Graduate Strategy Statement

This resume is written in Canadian English.

Katrianna needed a resume to help her reach the goal she had set when she began a marketing certificate: *secure employment with one of the niche advertising and public relations firms serving the financial services industry*. Her prior experience in banking and investments, together with the completion of a Marketing Management Certificate and relevant volunteer work were putting her on the path to achieving that goal – now her resume needed to reflect her qualifications.

Leading with an “Education and Professional Development” section allows the reader to review her specialized marketing training and related course work. A quote from a former professor was also included in the footer of page 1.

Katrianna was asked to think back through her employment history and detail quantitative achievements prior to our consultation. Heavily sales and business development focused, it was crucial that her work history contain as many quantitative facts as possible to prove her success in the financial services industry would translate to her new field.

Design elements for this resume include the header formatting and the use of separate boxes to draw attention to specific and quantitative accomplishments.

Using this resume, Katrianna has already started networking and set up several meetings with prospective employers.