

RACHIK GUPTA

FINANCIAL ADVISOR — Relationship Building, Sales Achievement, Mutual Funds

✉ rachikgupta81@gmail.com ☎ [+1 \(647\) 629-8754](tel:+16476298754) [in LinkedIn](#)

SKILLS

- **Financial Advisory:** Needs analysis, financial planning, investment solutions, mutual funds knowledge.
- **Banking Operations:** Branch operations, cash handling, cash reconciliation, transaction processing systems.
- **Client Management:** Salesforce, customer relationship management, client retention, cross-selling methods.
- **Regulatory Compliance:** Regulatory policy adherence, compliance monitoring, mutual fund regulations.
- **Technical Tools:** Digital banking platforms, POS systems, financial analysis, inventory management systems.
- **Financial Reporting:** Cost analysis, financial reporting, operational efficiency, investment strategy knowledge.

WORK EXPERIENCE

Customer Service Manager

May 2024 – Present

McDonalds

Exeter, ON

- Elevated customer satisfaction index by 15% by redesigning service workflows, restructuring shift coverage models, and resolving high-volume escalation cases.
- Strengthened operational throughput by 25% by reallocating task sequences, tracking queue intervals, and recalibrating inventory replenishment cycles.
- Rectified order variance by 20% by auditing transaction logs, enforcing process checkpoints, and reducing billing discrepancies during peak service windows.
- Enforced sanitation governance achieving 100% audit compliance by implementing control matrices and monitoring waste handling documentation.
- Consolidated daily revenue reporting by reconciling cash drawers, validating sales entries, and aligning labor allocation with demand forecasts.

Customer Service Representative

November 2024 – September 2025

Home Hardware Building Centre

Sarnia, ON

- Augmented customer retention by 20% by conducting structured needs assessments, mapping product specifications, and aligning recommendations to purchase intent.
- Accelerated revenue growth by 10% by implementing upselling frameworks, tracking basket value metrics, and analyzing repeat purchase behavior.
- Validated 100% transaction integrity by reconciling payment entries, verifying pricing structures, and documenting discrepancies for audit reconciliation.
- Refined merchandising accuracy by updating promotional layouts, tracking daily SKU movement analytics, and recalibrating stock placement based on demand data.
- Strengthened checkout throughput by reducing billing cycle duration, coordinating restocking intervals, and standardizing point-of-sale procedures.

Deputy Manager

January 2019 – November 2023

HDFC Bank

India

- Increased client retention by 15% by assessing portfolio gaps, recommending structured banking products, and monitoring lifecycle performance indicators.
- Generated 20% cross-selling growth by channeling qualified leads to product divisions, tracking advisory conversion ratios, and aligning sales pipelines.
- Safeguarded regulatory adherence by maintaining 100% compliance scores through reviewing cash operations and documenting internal audit checkpoints.
- Enhanced branch productivity by 25% by assigning performance benchmarks, evaluating service metrics, and recalibrating incentive allocation frameworks.
- Mitigated transactional risk exposure by reviewing threshold breaches, flagging irregular account activity, and documenting compliance variance reports.

EDUCATION

Post Graduation Certificate in Business Management

January 2024 – September 2025

Lambton College, Sarnia, ON

Master of Commerce (M.Com)

July 2017 – March 2019

Dr. BhimRao Ambedkar University, India

CERTIFICATIONS

- **Investment Funds in Canada (IFC)** – Canadian Securities Institute – February 2025