

LIMOZA DALIPI

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Objective

Seeking a position on the London Middlesex Health Unit board that promotes personal development and offers a platform to let me provide leadership, analytical and project support, contributing towards growth and responsibility towards its stakeholders.

Work Experience

TD Canada Trust Financial Group **Finance Analyst** **May 2012 - Present**

TD Canada Trust is one of Canada's leading banks, competing with banks such as, Royal Bank, CIBC and Bank of Montreal. Offering everyday banking needs, investment services, commercial and private banking.

I am responsible for analyzing revenue, expense and key metrics for TD's direct channel business units, preparing financial reports and planning the delivery of new reporting with my team. Fulfilling these responsibilities, I have gained experience by performing the following:

- Developing and analyzing business unit and product scorecards for TD's direct channel businesses (i.e. credit cards, easyline, insurance advice)
- Developing and analyzing champion reporting for direct channel businesses
- Auditing metrics and data (revenue, expenses, customer experience index, productivity, etc...) on business, product and champions reporting
- Using excel formulas and functions to build reports, as well as Hyperion, Helmsmen, and QMF
- Implement and organize new reports upon the request of executives, management, and business units
- Received positive feedback from coaching sessions with my manager on my productivity, teamwork and performance, to name a few
- Awarded *League of Excellence Award* for July 2012 for outstanding performance and leadership

TD Ameritrade Inc **Investment Services Associate** **January 2011 – May 2012**

TD Ameritrade Inc. is one of the largest US brokerage firms, competing with firms such as, Charles Schwab and E-Trade offering thinkorswim trading platform, advisor services, and institutional services

I am responsible to provide client service to investors in the United States, including referrals and sales leads to branch partners, provide necessary tools for clients to assist with their investing needs, and be a first stop resolution. By exceeding expectations, I have achieved:

- Recipient of Screaming Eagles award in my first month for exceeding sales targets and being top performer in my team
- Recipient of quarter two sales platinum award for having the highest amount of conversions and leads in my team
- Promoted to sales representative for my team, which I have helped my peers attain a strong level of sales resulting in my team being recognized for submitting the most leads in the department my strengths in teamwork, consensus building and influencing skills
- Sustaining and working towards strong level of client service with CSI of 84% for quarter two and CSI of 100% for third quarter, CSI champion for quarter four
- Consistently exceeded sales targets

NPT LLP**Staff Accountant****September 2009- September 2010**

NPT LLP is a mid-sized public accounting firm employing sixty professionals providing professional advisory in tax, accounting, consulting, health care, assurance, valuations and class actions.

I was responsible for completing complex assignments in tax, accounting and consulting to assist managers and partners, which consisted of the following:

- Performed various engagements like bookkeeping and compilations, as well as experience with assurance engagements (about 80 hours of review and 120 hours of audit) including not-for-profit, retail, agriculture, and medical professionals, to name a few
- Successfully completed one tax season, preparing tax returns for farm clients, professionals, businesses, etc... ensuring all assignments were complete and deadlines met using time management and multi-tasking
- For each corporate file, prepared their corporate tax return, ranging from agriculture, professionals, and retail just to name a few
- For each review session, received positive feedback on my performance and productivity
- Experience with complex accounting issues like life insurance policies, investments, to name a few
- Experience using CaseWare, CaseView and TaxPrep

In this position, I successfully achieved the following:

- Passed CKE in May 2010, successfully passed SOA in June 2010 placing in top third ranking for assurance and fourth for performance measurement. In this process, I was able to further develop my analytical, assurance planning and key soft skills to provide reasonable recommendations on a solution for the client
- Received an increase in salary and positive feedback for progressing to perform more complex tasks in my annual review

TD Canada Trust Financial Group**Collection Officer****May 2007- July 2009**

TD Canada Trust Financial Group is one of the largest of Canada's national banks and expanding in US markets, focusing on everyday banking needs.

In this position, I was responsible for analyzing customer accounts by reviewing credit history and using credit and risk analysis to develop strategies to prevent future debt for clients. In this position, I exceeded my job requirements, helping me achieve:

- Recipient of a sunshine award from a client for excellent client service and going above and beyond to exceed her needs
- Earned award for being top performer in the department.
- Maintain an excellent rating based on focus and drive for achievement to accept new challenges day to day, being recognized as top performer in the department for two consecutive quarters.

TechAlliance – Ivey Consulting Project**Project Leader****May 2008 – March 2009**

TechAlliance is an association of member companies in the technology sector and companies supporting this sector. They provide consulting for start-ups and support the technology industry in London and surrounding area.

In this position, I assumed the role as project leader of the Ivey Consulting Project, leading a project for TechAlliance. The project for TechAlliance was the development of a strategic plan for the London medical device industry. In this role, I performed the following:

- I was responsible for consulting with stakeholders (medical device companies, medical professionals, the government sector, etc...) to obtain research to develop the plan. This helped us find the needs of stakeholders, create a goal for the cluster, to develop the plan
- I was responsible for organizing team meetings and maintaining consistent communication with our client, TechAlliance
- The final report was well received and after two years, our ideas have started to be used in the development of the medical device cluster

King's University College (U.W.O.)

Teaching Assistant (Business 2257: Accounting and Business Analysis) – Prof. Ken Bowlby
Teaching Assistant (Mathematics 030: Calculus and Linear Algebra) – Dr. David Meredith

Sept 2008 - Jan 2009
Oct 2006 - Mar 2007

In these positions, I performed the following tasks:

- Assist professor with teaching accounting and business analysis by running tutorials and grading exams.
- Assist professor by developing tutorial program to focus on each student's needs for development with tutoring calculus and linear algebra, which engaged students in discussions that improved their comfort with the material reflecting successful performance on their exams.
- Supervise exams by ensuring students were following the professional code of conduct and implement consequences as necessary by informing the professor of that consequence.

By performing the above tasks, I achieved the following:

- Improving confidence level of students, which I helped one student increase his course grade by 30 per cent

London Fine Gold Jewelers

Sales Associate

July 2005 - May 2007

- Responsible for sales tasks and jewelry consulting
- Put the needs of customers first by designing and ordering custom jewelry to each client's preference
- Ranked as highest performer in my first winter season and promoted as key holder after my first six months

Core Competencies:

- Leadership and teamwork
- Financial, business and industrial analysis
- Business and strategic planning
- Credit and risk analysis
- Client service
- Accounting, taxation, and assurance
- Sales and sales management
- Time management and multi-tasking
- Banking
- Investing and trading
- Project management
- Project planning
- Problem solving

Education

Financial Industry Regulatory Authority

Series 7 - General Securities Representative Examination
Series 63 - North American Securities Administrators Association

July 2011
September 2011

Institute of Chartered Accountants of Ontario

Core Knowledge Exam
School of Accountancy

May 2010
June 2010

Richard Ivey School of Business, London, Ontario

Bachelor of Arts, Honors Business Administration, *Pass with Distinction*
Recipient of Access Based Bursary

June 2009

University of Western Ontario, London, Ontario

Management and Organizational Studies
Recipient of King's University College Entrance Scholarship for academic achievement.

September 2005 - May 2007

Personal Achievement & Activities

Canadian Cancer Society, Fundraising Coordinator	2012
Not-for-Profit Organization, Accounting Assistant & Internal Coordinator	2009 - Present
PwC Take the Lead Leadership Conference	2008
The Bruce Dodd's Cross Enterprise Challenge, First Place	2008
Volunteer Coordinator, Income Tax Clinic (University Student's Council)	2008
CA\$H Competition (ICAO)	2008
Chartered Accountant's Student Society: VP Finance	2007-2008
Upper Year Representative	2006-2007
Wall Street Investment Banking Boot Camp	January 2008
University Associate Program (ICAO)	2005-2009
The University of Western Ontario Admission Bursary	2007-2009
Ivey HBA Accounting Association: VP Finance	2008-2009
Member	2007-2009
Member, Ivey HBA Finance Association	2007-2009
University Student Council Representative	2006-2007
Member, University Student Council Committees	2006-2007
Race Unity Award (Bahá'í Community of London)	2005
Multicultural Club, Chair	2005
London Health Sciences Centre, In-Patient and Physio Therapy Volunteer	2004

REFERENCES

Available on request