



Veteran personnel management professional, with a vast knowledge on the intricate details of appraisals and processes needed for personnel development. Certified training development professional with more than 13 years of consulting experience in roles requiring the ability to design and deliver customized training, modules, and programs to diverse user populations. Detail-oriented with a passion for building interpersonal relationships, building training capacity for those seeking to achieve business outcomes. Dynamic, reliable and an accomplished client oriented professional.

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Driving cultural transformation for pinnacle growth

Selected Accomplishments | Competencies

- **Achieved 35% more efficiency**, 9% reduced cost and 10 days reduced application processing time; and managing staff through the change using ADKAR model at Training EDGE.
- **Redesigned created world-class training programs** and client service strategies, securing buy-in to new policies and procedures for E*TRADE.
- **Launched comprehensive client service programs**, moving E*TRADE from the #10 to #3 Dalbar ranking in one year.
- **Created and led core training sessions** for Keybase Financial staff and managers Canada-wide, ensuring regulatory compliance with SOPs.
- **Delivered training and inspired commitment**, successfully retaining nearly 100% of dealers through cultural change.
- **Managed teams** between 3 and 60 individuals and has been part of the hiring and termination process but more importantly the continuous management and coaching process.

- Employee Empowerment, Engagement & Retention
- Performance Management & Appraisal
- Coaching & Mentorship
- Business Planning
- Skill Gap & Training Needs Analysis
- Process Improvement
- Presentation / Facilitation
- Curriculum Design / ADDIE
- PROSCI Change Management
- E-Learning Initiatives
- Train The Trainer
- Project Management

Formal Education | Diverse Industry Credentials

PMP Candidate: Project Management Institute (June 2016)

Human Resources Management Diploma: UNI-Prep Canada

Project Management Certificate: LookingGlass Development

Certified Training & Development Professional (CTDP): Institute of Performance and Learning (formerly CSTD)

Masters Certificate in Adult Training and Development: Schulich / York University

Fellow: Canadian Securities Institute (FCSI)

Canadian Investment Manager (CIM): Canadian Securities Institute

Bachelor of Arts - Law: Carleton University

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Unleash the E.D.G.E.Educate • Develop • Guide • Empower

Career Path | Entrepreneurial & Corporate**Training EDGE**, Brampton, Ontario

October 2006 – Present

*Privately held Canadian L & D Firm with business in the global marketplace.***SENIOR MANAGER, LEARNING AND DEVELOPMENT**

Company involved in training strategies, design, delivery, evaluation and management company for health science, real estate, insurance, banks, retail, municipal government and other industry clients.

- Hands-on coaching and management of a team of 6 Learning and Development Specialists/Instructional Designers responsible for all operational learning initiatives within all Operational Lines.
- Continuous management and coaching process in between; involving inspiration and leadership, identification and communication of opportunities for continuous improvement, as well evaluation of team performance and strategies to improve on learning gaps. Conducted needs analysis using the ADDIE model.
- Developed facilitators through pilot programs or train-the-trainer workshops, and by providing coaching / feedback as necessary.
- Monitored the performance of facilitators to check that training programs are in line with approved training materials and procedures.
- Built strategic alliances with key stakeholders, both internal and external to identify points of leverage, enable leadership and management performance interventions, new employee onboarding and orientation, sales training, needs assessments and development of learning plans, career development plans and career exit plans.
- Provided customer-centric solutions to businesses in terms of performance assessments, training recommendations and design, e-learning and distance education, collaboration in training, and measuring training effectiveness.
- Identified duplication, underutilized and misallocation of resources, and unnecessary delays to minimize cost and maximize revenue while effectively managing staff through organizational change.

Keybase Financial Group / Argosy Securities Inc., Toronto, Ontario

March 2004 – October 2006

*Canadian business with over 100 independent Financial Advisors and \$1B dollars in assets under administration.***CHIEF COMPLIANCE OFFICER / COMPLIANCE TRAINER**

Hired originally as Compliance Manager for Keybase, promoted to interim Chief Compliance Officer of Argosy within six months. Mandated to review and interpret regulations under the Mutual Fund Dealers Association of Canada (MFDA), and to ensure compliance in the rapidly changing mutual funds environment.

- Managed project plan, budget, structure, schedule and staffing requirements to form the new compliance department.
- Lead and managed a team of Compliance Officers and Operational Administrators and worked closely with Branch Managers across Canada to promote a culture of risk management and compliance throughout all levels within the organization.
- Assessed individual and team's knowledge and skills to identify learning gaps by setting performance objectives, delivered on-going feedback and conducted mid-year/final performance reviews.
- Educated and trained Financial Advisors and Branch Managers, ensuring that clearly defined lines and standards of accountability were implemented and adhered with.
- Designed, developed & delivered regulatory compliance training courses for classroom, Instructor-led online, and eLearning.
- Developed and instituted analytical and prediction tools for suitability and risk assessment, compliance procedures, and internal audit using raw data to identify patterns and build compliance models.

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Experience Continued...**E*TRADE Canada Securities Corporation**, Toronto, Ontario

February 2000 - March 2004

*Canadian division of online investment firm with \$182B in customer assets worldwide.***QUALITY ASSURANCE TRAINING MANAGER**

Joined company as an associate and promoted within five months to oversee a team of brokers. Promoted to Quality Assurance Manager/Trainer as a result of proven knowledge and successes in developing a team of top-performers.

- Defined and developed training strategy for call center including capital markets and front office functions training. Also provided the leadership for the quality control for all the agents.
- Coached and mentored subordinates, identified training needs and recommended appropriate development programs.
- Managed the training delivery process to ensure organization effectiveness and development, as well as improve workflow.
- Liaised with vendors, suppliers and cross-departmental colleagues to achieve desired business results, planned profitability levels, quality standards and highest-level client satisfaction.

Additional professional experience includes 2 years with CIBC Wealth Management, starting as an Account Manager and culminating in position as a Financial Advisor for Imperial Service.

Additional Financial Services Training

Financial Markets Risk Management • Options Supervisor's Course • Canadian Insurance Course • Options Licensing Course • Derivatives Fundamentals Course • Partners, Directors And Senior Officers Course • Branch Manager's Course • Professional Financial Planning Course • Canadian Securities Course • Conduct & Practices Handbook • Ethics Seminar • Portfolio Management Techniques

Additional Specialized Training:

Investment Representative Training •, 30-day course for IDA Licensing • CSI's 90 Day Investment Advisor Training for (RR License) • Investment Planning Course • Advanced Mortgage Training Course • CIBC Retail Banking Training Program Financial Solutions & Sales Process • Introductory & Advanced Courses • Dealmakers 1 & 2 – Balancing Risk Management & Proactive Sales in Consumer Lending

Technical Expertise | Computer Proficiency**Skilled in course authoring tools, such as:**

Articulate | Camtasia | Captivate | Storyline | Photoshop | Presenter | WebEx | Snagit | iSpring LMS | Moodle LMS | SCORM

Volunteerism | Community Commitment**Advisor & Financial Supporter:** Arising Women - Women's Shelter**Civilian Instructor / Sponsoring Committee Member:** Air Cadet League of Canada – 132 Spitfire Squadron