

Kelly Bryan

778-557--5524

My Virtual Card: <https://hihello.com/p/81e469c6-95da-4054-bf91-6ada923f4bac>

Objective

Results-drive Goal Oriented quick learner with over 20 years in Sales and Customer Service. I adapt quickly to any situation or challenge as a think outside the box individual. Demonstrates strong client relationship management skills, extensive community engagement, and a commitment to delivering exceptional customer experience and support.

THE MEAT BOX - Lethbridge, AB

Sales/Customer Service

(July 2024 - March 2025)

- Custom Meat Order
- Shipping & Receiving
- Freezer Management
- Customer Service
- Product Sales
- Cross Selling

EXPAT CONSULTING (Relocation to Mexico)

CLIENT SERVICE – Ixtapa-Zihuatanejo, GRO Mexico

(November 2021 - Jan 2024)

- Assisting Expats complete both temporary and permanent Residency Applications
- Planning & Strategy to comply with Consulate Financial Requirements, bank statements, notarization requirements.
- Facilitation of Consulate Strategy
- Property Management for new Expats to secure property through my Spanish Business Referral Network
- Vetting Spanish Accountants, Attorneys and Notaries for completion of required Expat documents for residency, home purchase, house and vehicle insurance.

ASSOCIATE FINANCIAL ADVISOR

COOPERATORS FINANCIAL – Victoria, BC (Mar 2018 – October 2021)

- Provided tailored financial advice to clients, Insurance Planning, Segregated and Mutual Fund Investment Solutions.
- focusing on wealth management, retirement planning, and investment growth.
- Designed and implemented a scheduled contact plan, ensuring consistent client engagement and proactive financial planning reviews.
- Facilitated financial literacy for clients, increasing their understanding of investment and budgeting strategies.
- Cultivated high-quality client relationships through exceptional service and education on financial options.
- Developed “The REAL LIFE Budget” for my clients with strategic and individual implementation sessions.

MORTGAGE DEVELOPMENT MANAGER

SCOTIABANK – Victoria, BC (2010 – Jan 2018)

- Built valuable referral partnerships with Realtors and community members, enhancing client acquisition in the mortgage market.
- Created and presented comprehensive mortgage and protection solutions, ensuring client plans aligned with their financial goals.
- Delivering strategic solutions for homeownership that incorporated both immediate needs and long-term asset achievement goals.
- establishing a strong market presence to cultivate new and existing business
- Innovative and critical thinking skills
- Built independent Developer Relationships (Sunriver, Otter Point, The Mews, The Heron Estates, with onsite office to meet with clients)
- Real Estate Stands in branches with my Developers and Realtors Listings
- Developed strategic marketing plans and employ outside the box thinking
- Maintained several high value Realtor & Business cross Referral Networks

FINANCIAL ADVISOR

SCOTIABANK – Victoria, BC (2005 – 2010)

- Oversaw a large book of business, focusing on investment, lending, and financial planning services to help clients achieve financial security.
- Generated new business through regular branch presentations and community engagement initiatives across Prince George and Victoria.
- Conducted sales-building workshops for frontline staff, coaching them in identifying opportunities and making high-quality referrals.
- Facilitated strong referral relationships with ScotiaMcLeod and Scotia Private Client Group, helping direct high-value clients to Trust & Estate Planning services.
- Organized high-net-worth client presentations at The Oak Bay Golf Course, strengthening relationships with Scotia Private Client Group.

SENIOR PERSONAL BANKER

SCOTIABANK – Prince George, BC (Jan 1999 – 2005)

- Managed a diverse portfolio of clients, delivering exceptional service in retail lending, credit management, and account services.
- Identified client needs and developed customized recommendations aligning with their short- and long-term goals.
- Consistently met and exceeded sales and service targets, contributing to branch growth and client retention creating client centred service excellence.
- Built strong community connections to support new client acquisition
- Made referrals to partners as necessary to further grow client relationship through continual needs assessment.

References Available Upon Request

Volunteer Experience and Community Development

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Parent Advisory & Dry Grad Committee (2018/2019) Claremont Senior Secondary, Cordova Bay, BC

- Planning activities for the Grad 2019, liaised with School Principal to apply and submit funding applications for events and activities.
- Volunteer Activities (Christmas Tree Chipping, Bottle Collecting Campaigns, Fundraising, liaised with Petro Canada to set up Gas Account for Grad 2019
- Planned Events through school year and securing locations, licensing, permits, security as necessary for GRAD events planned throughout the year.
- Second Signing authority on funding accounts
- Implemented heads for each planning need and delegated as necessary
- Kept everyone on track and accountable to goals and weekly agendas.

Parent Advisory & Fundraising Committee - (2011/2012)

Westmont Montessori School, Victoria, BC

- Fundraising for new Gymnasium Construction
- Weekly Popcorn Sales
- School Garden, selling flowers and vegetables

Parent Advisory & Fundraising (2015 -2017)

Westshore Rebels Cheerleading, Victoria, BC

- Fundraising for NCAA Championships in Seattle
- Spearheaded implementation of Team Insurance Policy for Injury
- Fundraising for Team Uniforms and away trips.
- Parade Management



Jennifer Kakoske · 1st

Realtor with Best Coast Real Estate Group and REMAX Camosun

July 19, 2019, Jennifer was KC's client

All LinkedIn members

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KC is a wealth of knowledge when it comes to family planning. As a mom of two under two and on maternity leave for the past year, budgeting and managing our families household income was really important. In the past 2.5 years our financial needs have changed, it's amazing how much two little humans can affect your budgets. KC helped me get a thorough budget in place which in a really cool way made me feel like I had more money to spend. I love the system that she created and the conversations it lead to for me and my husband. It's put us on the same page and definitely strengthened our marriage. Also, KC is a joy to have in the home, so her time with us was always something I looked forward too.



Derek Braaten · 1st

REALTOR at Sutton Group West Coast Realty

December 20, 2011, Derek worked with KC but they were at different companies

All LinkedIn members

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Over the past few years, I've sent a number of Buyer referrals to Kelly for mortgage pre-approvals, refinancing, or simply 2nd opinions. The feedback from my clients has always been positive and I have no reservations whatsoever sending her more business in the future. Kelly is experienced, professional, positive, and very enthusiastic in her approach. What's more, she is accessible, at the times when you need her most. And in this business, that is invaluable.