

Saad Husain Siddiqui

FINANCIAL ADVISOR — Financial Modeling, Advanced Excel & SAP Navigation

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📍 [Ontario](#)

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SKILLS

- **Financial Operations:** Budgeting, forecasting, account reconciliation, DSO tracking, AR and WIP monitoring.
- **Financial Systems:** SAP navigation, reporting, payment resolution, billing systems, process improvement.
- **Data Management:** Advanced Excel, pivot tables, VLOOKUP, financial models, time recording tools.
- **Client Systems:** Salesforce, HubSpot, ServiceNow, document archiving systems, intranet search optimization.
- **Document Handling:** Slide master use, formatting, proofreading, template creation, digital troubleshooting.

WORK EXPERIENCE

Founder / Owner

January 2024 – January 2025

ICare Essentials

Ontario

- Engineered full-cycle procurement workflows using SAP navigation and Excel models, cutting stockout occurrences by 35% while improving turnover ratio of SKUs across high-demand inventory categories within 3 quarters.
- Instituted real-time KPI dashboards for revenue targets, order fulfillment, and account balances using Power BI and Excel, resulting in 26% faster financial reconciliation and actionable sales insights per campaign iteration.
- Implemented CRM-based customer account management through HubSpot and Salesforce, increasing repeat purchases by 31% while maintaining compliance with regulatory protocols and optimized ticket turnaround.
- Audited monthly supply chain expenses by cross-verifying PO-level receipts and WBS-linked allocations, enabling a 19% reduction in recurring vendor-related discrepancies and improved budget tracking accuracy per cycle.
- Devised strategic marketing schedules and content funnels using digital traffic analytics and campaign triggers, increasing user engagement by 40% while aligning funnel milestones to inventory forecast and availability updates.

Banking Advisor

October 2022 – December 2023

Royal Bank of Canada

Ontario

- Processed over 1,000 financial service requests by validating KYC, transaction records, and account flags through ServiceNow and Salesforce, ensuring 99.7% SLA adherence and minimizing escalations during quarter-end cycles.
- Monitored high-risk client accounts for unusual activity, resolving discrepancies through SAP and internal audit logs, contributing to a 23% drop in AML-triggered alerts and enhanced compliance within regulatory timelines.
- Generated investment reports using CRM datasets to interpret mutual fund behaviors and projected ROIs, enhancing product suitability insights and boosting upselling success rate by 17% per quarterly campaign batch.
- Analyzed feedback metrics and call recordings to optimize client interaction scripts using NLP cues, reducing average handling time by 11% while retaining a 94% satisfaction index across new and returning client cohorts.
- Classified client outreach logs and risk levels for audit trails and documentation workflows using HubSpot, increasing document data access by 45% and enabling superior tracking during advisor performance evaluations.

Administration Assistant

March 2020 – October 2022

Teleperformance

Ontario

- Structured and disseminated event agendas, travel calendars, and coordination templates for 100+ internal sessions using Outlook and Excel trackers, cutting reschedule conflicts by 62% across distributed support teams.
- Facilitated onboarding of 150+ new hires by deploying compliance checklists, payroll data forms, and ID tracking via SharePoint, reducing document processing time by 3 days per batch across HR and admin control systems.
- Archived training decks, SOPs, and audit checklists in shared network repositories with version controls, improving access latency and eliminating document mismatches during quarterly quality assurance walkthroughs.
- Controlled digital infrastructure for internal meetings and hosted 80+ virtual sessions using Teams and Zoom, ensuring 1.2% tech disruptions while validating AV scripts and hardware syncs prior to live remote broadcasts.
- Curated backend support tickets and operational logs during live shift overlaps using ServiceNow, improving turnaround time by 28% and providing reliable timestamped issue resolution trails during backend audit cycles.

EDUCATION

Postgraduate - Hospitality & Tourism

January 2019 - December 2019

Niagara College, Ontario

Graduate - International Business Management

January 2018 - December 2018

Niagara College, Ontario

Bachelor of Commerce

April 2013 – March 2016

University of Lucknow, India

CERTIFICATIONS

- CSC – Canadian Securities Course
- IFIC – Investment Funds in Canada
- Financial Modeling & Investment Banking
- Anti-Money Laundering