

KHALIL L. BRAITHWAITE
NASSAU, BAHAMAS
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WORK EXPERIENCE:

LENO CORPORATE SERVICES LTD
Nassau, Bahamas

OCTOBER 2010 – Present

Manager – Business Development & Client Relations

Position Responsibilities (included but were not limited to):

- Developing & Implementing Strategies for Marketing, Client Relations, & Business Development
 - Identify Potential Industrial Clients for Pension, Accounting, Payroll &/or Investment Management Services
 - Develop & Execute Marketing Strategy for LENO's Products & Services
 - Primary Contact for Individual Clients
 - Develop Various Financial Seminars (Financial Planning, Retirement, etc.)
 - Develop & Deliver Presentation to Clients
 - Advise Client to select investment vehicles as it relates to client's objective
 - Raise Corporate Profile of LENO via television (business tips – Bahamas @ Sunrise, You & Your Money) and print media

CFAL (COLINA FINANCIAL ADVISORS LTD.)
Nassau, Bahamas

MAY 2004 – October 2010

Associate – Marketing & Client Relations

Position Responsibilities (included but were not limited to):

- Service All Clients (Over-The-Counter-Clients (OTCC), Walk-In-Clients (WIC), & Existing Clients (EC))
- Prepare Proposals (Investment Management and Pension)
- Prepare & Deliver Presentations
- Initiate Contact with Potential Clients (cold calls & Agent referrals)
- Agent Training & Support
- Supervise the Junior Investor Education Program
- Compile & Distribute Newsletter
- Money Matters Article (weekly) – the Nassau Guardian Newspaper
- Sales Reporting

- Developing Marketing Strategies
- Facilitating and participating in financial functions on behalf of the company

DELOITTE & TOUCHE.

Nassau, Bahamas

Summer of 2001

Corporate Services

Responsible for the administration and creation of International Business Corporations (IBC's) for existing and potential clients.

Duties assigned encompassed but were not limited to:

- Liaising with legal counsel on formulation of IBC constitutive documents
- IBC database management via Microsoft Office Suite of business applications
- Responsible for handling client requests and dissemination of client related information to the respective IBC client database
- Fielding incoming inquiries and liaising with senior management for issue resolution

EDUCATION:

◇ **YORK UNIVERSITY** August 2003

Toronto, Canada

Bachelor of Arts

Business & Society: Economics & Labor Studies

Vice President of the United Caribbean Students Association (U.C.S.A)

2001-2002

◇ **ST. ANDREWS COLLEGE** June 1998

Aurora, Canada

College Prep.

Completion of Ontario Academic Credits (O.A.C.'s)

(English, Creative Writing, Economics, Calculus, Finite Math, Physiology)

◇ **QUEENS COLLEGE** June 1996

Nassau, Bahamas.

High School Diploma

Prefect

PROFESSIONAL ACCOMPLISHMENTS

- CERTIFIED FINANCIAL PLANNER DESIGNATION FROM THE BAHAMAS INSTITUTE OF FINANCIAL SERVICES (BIFS)

COMMUNITY SERVICE

Program Objective ~ each High School participating in the program must create a portfolio to invest (a fictitious) \$100,000 using investment guidelines set by a (fictitious) client and actual market performance. The winner of the competition will be determined by the highest level of return for their portfolio based on the investment guidelines.

Investment Coach – C.I. Gibson High School (Winners of the Program)

Member of the Co-ordination Committee for the Program

Position responsibilities included but were not limited to:

- Meeting with your high school team a minimum of two (2) times a month
- Educating students about investing in the Financial Markets
- Coordinating with the teacher to ensure their classes and our mini financial workshops encourage and achieve a greater understanding for students
- Stimulating analytical discussions without offering any professional advice
- Encourage independent analysis without offering any professional advice