

HIGHLIGHTS

CFA LEVEL III CANDIDATE

MODELOFF 2013 – WORLD FINANCIAL MODELING CHAMPIONSHIP

- Competed amongst 3000 participants from over 100 countries to solve case studies and financial modeling questions
- Completed two rounds; each with a duration of three hours. Advanced to the semi-finals and finished in the top 20 percent
- Competed against associates, analysts and managers from Goldman Sachs, E&Y, Deloitte, KPMG, Citi and BlackRock
- Competed against Harvard, Wharton, Columbia, and Stanford MBA students

QUADRANT SKEW CAPITAL INVESTMENT CLUB

- Founded non-profit investment club in October of 2013 to invest pooled capital and to launch educational initiatives
- Managed a long short equity portfolio, executed trades, reviewed portfolio allocation and performance
- Portfolio one-year return of 9.9% (Jan 2014 to Jan 2015) which ranks in the 92nd percentile of long short equity funds per Morningstar
- Completed fundamental equity research reports on thirteen target companies across multiple sectors including healthcare, metals & mining and technology. Valued target companies using DCF and comparable comps financial models
- Launched an equity research internship program in December 2013; received over 230 applications and trained students from Princeton, Richard Ivey, NYU Stern, Waterloo, University of Toronto and the London School of Economics

SEEKING ALPHA

- Completed research article published by Seeking Alpha as premium content with readership of over half a million readers
- Received positive feedback and follow-up questions from multiple hedge fund managers

YAHOO FANTASY SPORTS

- Developed a proprietary excel model to value NFL, MLB, and NBA athletes based on real-world statistical data
- Achieved a 100 percent playoff qualification rate using statistical valuation despite limited knowledge of sport or athletes

WORK EXPERIENCE

STATE STREET

Associate – Cayman and Alternative Investments

Toronto, ON
October 2013 – Present

- Lead on department's largest client with over \$19 billion in assets invested across eighteen hedge funds
- Analyzed performance data of AIS department and generated executive reports for senior management review
- Coordinated with multiple global teams including corporate actions, fund accounting, trade processing and FX brokers
- Reviewed security holdings, reconciled monthly NAV, tracked fund performance and monitored fund operations

CITCO FUND SERVICES

Specialist – Investor Relations

Toronto, ON
February 2013 – September 2013

- Managed account of onshore fund of funds hedge fund client domiciled in Illinois
- Worked in five-member team to resolve investment manager and investor inquiries
- Reviewed and distributed quarterly investor letters detailing fund performance, market commentary and investment strategy

FRANKLIN TEMPLETON INVESTMENTS

Representative – Investor and Dealer Services

Toronto, ON
June 2011 – February 2013

- Provided client services and support to mutual fund investors, financial advisors and sales team
- Ranked top five in performance among team of twenty-five
- Grew Assets Under Management by \$474,000 via sales leads

EDUCATION

UNIVERSITY OF TORONTO

Honors Bachelor of Science with High Distinction

- *Academic:* Psychology Major. Graduated in the top 10%
- *Awards:* 3rd year Honors List (3.8 GPA) and 4th year Honors List (3.8 GPA)