|  |  |
| --- | --- |
|  | **Full Name** |
| fullname@gmail.com ♦ (123) 123-1234 ♦ linkedin.com/in/fullname | | |
| **OBJECTIVES** | | |
| I am a young finance professional with a Bachelor of Commerce degree currently pursuing the CFA designation, seeking to obtain an investment research and analysis oriented position with a team providing plentiful growth opportunities. | | |
| **WORK EXPERIENCE** | | |
| **ABC Bank Financial – ABC Wealth Management Team**  *Investment Associate* | | **Toronto, ON**  *May 2018 – Present* |
| * ABC Wealth Management is an award-winning team of Portfolio Managers and Investment Associates managing +$1.2bn of assets, actively managing 3 equity baskets and 1 ETF basket. * Assist Investment Advisors in pitching our services and investment strategies by analyzing prospective client’s holdings to identify potential improvements to their portfolios, and opportunities to increase risk-adjusted returns. * Rank prospect holding against ABC basket holdings and key benchmarks on a relative strength (momentum factor) basis using SIA Charts software. * Took the initiative to remodel the team’s pitchbook which has since generated +$15mm of net new assets. * Construct research reports for Portfolio Managers and clients, such as a detailed report for a client interested in investing in the AI space, which was featured in our team’s weekly newsletter. * Research investment ideas, stay up to date on client holdings, ABC basket holdings, and financial markets in general. * Provide stock quotes using ThomsonOne and buy/sell securities as instructed by Portfolio Managers or clients. * Perform various other operations such as private placement purchases, new issue purchases, DAP/COD account settlements, cash management activities, tax reporting activities, and preparation of various portfolio reports for clients. | | |
| **Canada Post Corporation**  *Summer Analyst, Credit Management Team* | | **Ottawa, ON**  *May 2017 – August 2017* |
| **EDUCATION** | | |
| **University of Ottawa – Telfer School of Management**  *Honours Bachelor of Commerce, Finance Specialization* | | **Ottawa, ON**  *September 2014 – August 2018* |
| * Fourth-Year GPA: 3.3/4.0 * Relevant Coursework:Equity Valuation, Portfolio Management, Corporate Finance, Financial Accounting, Finance Ethics, Finance Theory, Options & Futures, Fixed Income Investments, Money & Banking | | |
| **Major Projects**  *Equity Valuation (Grade: A)*   * Using Bloomberg, 10-K/Qs, MD&A transcripts, and various oil and gas sector reports I built DCF and trading comparables financial models for Husky Energy to strategically value the company. Constructed a pitchbook in PowerPoint outlining my valuation methods to ultimately make an investment recommendation on the company. | | |
| *Portfolio Management (Grade: A-)*   * Utilized Bloomberg, FactSet, and CapIQ to analyze securities and retrieve data on equities, bonds, and ETFs to construct a diversified investment portfolio based on Modern (Markowitz) Portfolio Theory. | | |
| **ADDITIONAL INFORMATION** | | |
| ***Other Interests:***Hockey, Golf, Sports, Fitness, Travel  ***Certifications:***CFA Level I Candidate, CSC, CPH  ***Modeling:***Wiley Investment Banking (Rosenbaum and Pearl)*,* FactSet Financial Modelling Course  ***Software:*** Proficient in Microsoft Office Suite programs, Bloomberg, ThomsonOne, SIA Charts, CapIQ, and FactSet  ***Leadership:***Elected Varsity Boys Hockey Captain (High School) | | |