

# Name

Address

E: Email

T: Phone Number

## EDUCATION

### **Non-Target University**

**City, Province**

Bachelor of Commerce; Accounting & Finance Major

Expected Graduation: January 2021

- Cumulative GPA: 3.84/4.30; Major GPA: 4.15/4.30
- Enrolled in Co-operative Education Program
- Pursuing CFA Level 1

## WORK EXPERIENCE

### **Private Equity Fund**

**City, Province**

Incoming Fall Investment Analyst

*Sep 2019 – Jan 2020*

- Exposure to Net Assets Under Management of more than \$XX.X billion on the real estate team.
- Focused on establishing joint ventures with partners to invest in global urban real estate.
- Responsible for building and maintaining financial models for a global portfolio of real estate assets using ARGUS and Microsoft Excel. Continued honing financial modeling knowledge through courses administered through the Marquee Group.

### **Student Managed Endowment Fund**

**City, Province**

Fund Manager

*Sep 2018 – Aug 2019*

- Conducted financial and strategic analyses of various Real Estate Investment Trusts and Energy Companies using multiple methods of financial modeling (DCF, NAV, DDM, Comparables).
- Developed investment theses for the Real Estate Investment Trust sector of the fund using an overall bottom-up approach. Theses required discussions with REIT executives, and the production of presentations and written reports to Directors and industry mentors.
- Successfully pitched Killam Apartment REIT for a 725-unit position of the trust.
- Honed quantitative and qualitative skills through valuable education administered by Bloomberg training modules, Capital IQ, the Marquee Group.

### **Government Taxation Agency**

**City, Province**

Tax Auditor

*Jan 2019 – Aug 2019*

- Managed audit risk for various corporations through diligent screening processes and the analyzation of financial documents relevant to the corporation.
- Assisted Senior Auditors with preliminary reviews, data analysis, and interviewing registrants to ensure compliance with GAAS and Tax Legislation.

## LEADERSHIP

### **Accounting Society**

**City, Province**

President

*May 2019 – Present*

- Assisted society members with recruiting advice, professional guidance, and competency development.
- Collaborated with local organizations for recruitment opportunities at Accounting and Finance related career fairs exclusive to University students.

### **University Student Association**

**City, Province**

Tutor

*Sep 2017 – Present*

- Developed and administered educational content for the commerce faculty in the subjects of accounting and finance. Offered mid-term and final examination tutorials.

### **Women in Capital Markets**

Volunteer

- Championed for women pursuing capital markets careers through event specific promotions, and discussions with panelists to provoke ideas for event attendees to ask the panelists.

**Interests:** Squash, Running, Reading, Podcasts, Powerlifting, and Labrador Retrievers.

**Extracurriculars:** 2020 Case Competitor in the CFA Research Challenge, and ICBC - Finance.