

Senior Business Analyst

(Focus Areas: Equities, Fixed Income, Unified Managed Accounts)

416.363.9888
planet4it.com

PROFILE

A CSC and CFA Certified Senior Business Analyst with extensive experience in Capital and Wealth management projects in prime Canadian financial institutions.

EDUCATION

2001

Top Canadian University
Bachelor of Arts - Economics with Econometrics Specialization
Areas of Focus: Econometrics, Statistics, Forecasting, Quantitative Finance, Mathematical Economics, Accounting

Certification:

Current

CFA Institute - Candidate for Chartered Financial Analyst (CFA) Level II

2004

CFA Institute - Candidate for Chartered Financial Analyst (CFA) Level I

2000

CSI - Canadian Securities Course certification

TECHNOLOGIES

BA Tools:

Visio, MS Project, Excel

Methodologies:

SLDC

Applications:

Calypso, Trade Order Management Systems, X.Eye, Bloomberg, FMC Suite, Portia, Shazam, SAS

OS:

Windows XP/NT/00/98

Languages:

Oracle PL/SQL, VBA, WinSQL

PROFESSIONAL EXPERIENCE

June 2014
to Present
(contract)

Investment Research Firm

Toronto, Ontario

SENIOR BUSINESS ANALYST, Product Development

Member of Products team to improve web based advisor software products (Integrated web tools & Advisor Workstation) and Project Lead on the new ISRP (Investment Suitability Risk Platform)

- Project Manager on various 'AWS' (Advisor Workstation) UI projects as it relates to stock, ETF, mutual fund research; portfolio builder and asset allocation, HYPO and research reports
- Project lead on the new ISRP risk tool; compare portfolio level risk to client risk profile, risk calculations based on portfolio CVAR and Holdings based standard deviation; security proxy logic analysis, generation of user/design stories (JIRA) in AGILE mode; acting scrum master and product owner while working in a cohesive development environment
- Assisting in the migration of PALTRAK users to AWS 2.0; institutional and user configuration
- Working knowledge of CPMS, Paltrak, and Morningstar Direct

April 2012
to May 2014

Leading Securities Firm

Toronto, Ontario

SENIOR BUSINESS ANALYST