PROFILE

Analytical CFA® Charterholder and MBA with deep experience in data analysis, financial modeling, and business intelligence. Recently completed the CFA Institute Data Science for Investment Professionals Certificate to further develop expertise in Python, machine learning, and AI. Former full stack developer passionate about leveraging data to drive business outcomes.

Information Technology

Languages: C, C++, Objective-C, Java, JavaScript, KQL, PHP, Python, T-SQL, VBA

Databases: SQL Server, Oracle, MySQL, Azure Data Explorer

Data Science: NumPy, pandas, matplotlib, SciPy, seaborn, sklearn, Tableau, Power BI

Acronyms: XML, SOAP, UML, ODBC, TCP/IP, CMS, CRM, SAAS, RESTful, JSON, regex

WWW: Blogging, WordPress, e-Commerce, e-Learning, SEO, CSS

Work EXPERIENCE

### Performance Analyst 2023 -

Mawer Investment Management Ltd., Calgary, Alberta

Reporting to the Manager of Data Distribution, as part of a distributed team responsible for ensuring the accuracy and timeliness of fund performance, client portfolio performance and associated attribution and risk metrics. Calculations performed in SimCorp Dimensions, SQL Server, Excel and Power BI.

* Managed and audited monthly client performance calculations of over 50,000 SCD performance reports, consisting of 23 performance periods plus associated portfolio characteristics ensuring BD3 availability while maintaining over 99% accuracy.
* Calculated and audited replication of 41 performance indices and their associated universes of securities bi-weekly, enabling monthly and quarterly fund and portfolio performance attribution calculations.
* Ensured accuracy of daily NAV performance calculation for 28 Mawer fund portfolios.
* Won MVP of year long Business Technology teambuilding competition.

### Senior Business Intelligence Analyst 2021 - 2023

Mawer Investment Management Ltd., Calgary, Alberta

Reporting to the Manager of Enterprise Reporting and Data Analytics, as a Scrum team member used: SQL Server, Oracle, Excel, Power BI, DAX, and Python to create models and reports which calculated portfolio performance, portfolio holding characteristics, AUM, netflows, and portfolio performance attribution for clients, staff and external consultants.

* Wrote code, specifications, documentation and UAT tests for SimCorp Dimensions (SCD) multi-asset, front-to-back investment management platform implementation.
* Calculated and classified $97 billion in firmwide AUM to the nearest penny, using holdings from over 15,000 internal portfolios and external data for SMA and 3rd Party clients. Leveraged Power BI to visualize AUM, netflows and client retention metrics.

### Reporting Analyst 2019 - 2021

Mawer Investment Management Ltd., Calgary, Alberta

Reporting to the Manager of Enterprise Reporting and Data Analytics, analyzed existing business processes, data sources, and coordinated report automation initiative. The project integrated data from Advent Portfolio Exchange, FactSet, Charles River IMS, and other sources into self serve Power BI dashboards and reports generated using SSRS.

* Inventoried and analyzed over 400 reports issued to internal and external clients.

Work EXPERIENCE Continued

### Online English Trainer 2015 - 2019

EF English First Language Training (EF), Shanghai, China

Reporting to a Team Leader, taught private and online group lessons using Adobe Connect and EF’s custom web based teaching platform.

* Beta tested, trained staff and provided end-user support on the teaching platform.
* Created custom PowerPoint training decks and served on the Content Taskforce.
* Student Evaluation Scores in both group and private lessons averaged over 4.9/5.0.

### Senior Technical Analyst 2013 – 2014

Carlson Wagonlit Travel (CWT), Vancouver, BC

Reporting to the Manager of Leisure Technology, responsible for upgrading and improving existing systems and researching the migration path for custom ColdFusion based extranet. Managed updates, bug reports and change requests for e-commerce websites using Agile/Scrum methodologies. Coding and mentoring provided in ColdFusion, JavaScript, HTML, CSS, and SQL.

* Product Owner during a 6-month period in which online sales increased 171%.
* Recognized by coworkers for providing outstanding customer service.
* Improved Google Analytics e-Commerce sales funnel reporting and campaign tracking. Created custom scripts, events, segments, filters, reports and dashboards.
* Increased social media integration using Facebook API, Pinterest, and jQuery.

EDUCATION

### Master of Business Administration, Entrepreneurship 2006

Sauder School of Business, University of British Columbia, Vancouver, BC

### Bachelor of Computer Science (Co-op) 2000

University of Victoria, Victoria, BC

Licenses & CertificAtions

### Data Science for Investment Professionals 2025

CFA Institute, Charlottesville, Virginia

### CFA® Charterholder 2022

CFA Institute, Charlottesville, Virginia

### Exam 761: Querying Data with Transact-SQL 2020

Microsoft, Redmond, Washington

### Python for Financial Analysis and Algorithmic Trading 2019

Udemy

### Professional Scrum Master™ (PSM I) 2018

Scrum.org