



**Cassie R.,** B.Sc

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Ottawa, ON XXXXXX

## BUSINESS ANALYST

Pro-active and results oriented, with over 10 years of financial experience in database management and financial analyst. Demonstrates the ability to enhance the management of client information, as well as develop and implement financial solutions that ensure organizational growth. Exceptional skills in organizing, documenting, planning, and business support. Analyzes fiscal needs and goals, streamlines existing operations, identifies unprofitable systems, implements new concepts and performance enhancements and follows through with development, direction and execution. Highly proficient in Microsoft Office products such as *Project, Excel, Word, Access, Visio and PowerPoint*. Knowledgeable in *SQL databases, Unitrax, Access, SYSTAT, and Bloomberg terminal*.

### FINANCE

Orchestrates the development and submission of revenue reports for regulatory bodies. Generates monthly reports and annual reports for describing financial performance, variance explanations and revised forecast. Corresponds with management and external vendors to strategize and develop financial solutions to increase organizational performance.

### BUSINESS ANALYST

Gather, analyze and document financial report requirements. Corresponds with management to establish functional and non-functional system requirements. Performs analyst on CRM System upgrades. Provides business support to executive level management team.

### PROJECT MANAGEMENT

Sophisticated record of contribution with financial corporations in the design, implementation, and management of financial services databases and client-server systems. Experienced in leading employees in business expansion projects. Trains and develops team members to perform at optimal levels and contribute to organizational goals.

### Key qualifications include:

- Leadership
- Analytical Skills
- Data Analysis
- Reporting/ Documentation
- Business Development
- Financial Statements
- Problem Solving
- Customer Service
- Business Support

## PROFESSIONAL EXPERIENCE

### DATABASE/ PROJECT MANAGER

Excel Funds Management Inc / Ottawa, ON / 2008 – Present

*Specializes in Mutual Funds, Emerging Markets, Investment Management, and Investing.*

Trained and Developed part-time employees, directing efforts in expanding national database. Provided queries to support sales team, improve identification of business opportunities, and refine sales territories. Analyzed data and corresponded with V.P. of operations to review statistics to strategize growth initiatives. Provided monthly and annual revenue reports for submission to IFIC and internal circulation. Liaised regulatory bodies for submission of training activities to obtain CE credits recognition. Corresponded with client services team to investigate complex trade inquiries.

### Selected Accomplishments:

- **Developed “Point of Sale” fund fact sheets for OSC filing** – Managed the New York Securities Commission (OSC) filling as project lead. Successfully completed filling process within a tight 45 day time period.
- **Performed two CRM upgrades** – Coordinated complete upgrade life-cycle and liaised with external vendors to minimize impact/risk, resulting in increased functionality for sales executives.



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### DATABASE MANAGEMENT

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Pro-Financial Asset Management / Oakville, ON / 2005 – 2008

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*Leader in delivering the award winning FTSE RAFI methodology through its Pro-Index Funds and Pro-Guaranteed Funds divisions.*

Developed infrastructure tracking resource for wholesalers by corresponding with team members. Analyzed discrepancies by consulting with external organizations and obtaining solutions, resulting in increased customer satisfaction.

Selected Accomplishments:

- **Implemented CRM System** – Improved ability to access documents and client related information.

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### ADMINISTRATOR

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Legacy Investment Management / Oakville, ON / 2001 – 2003

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*Specializes in investment opportunities primarily for business owners, key corporate executives, and other high net worth investors.*

Managed client relations and provided exceptional customer service to process client trade requests. Applied conflict management strategies and empathetic listening skills to resolve problematic client situations.

Selected Accomplishments:

- **Processed financial trades in a high volume setting** – Utilized Winfund to accurately process investment trading.
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### VOLUNTEER EXPERIENCE

**CIBC Run for the Cure**, Individual Participant Coordinator, 2010 – Present

- Surpassed fundraising efforts by 100%, achieving \$600,000 in donations by collaborating with 10 organizers and supports during the inaugural run.
- Generated reports, organized participant database, set up “e-blast” system, and analyzed documents.

**Professional Education Organization International (PEOI)**, Online Course Developer, 2011

- Develop online learning material for non-profit organization specializing in provided non traditional education to third whole countries.
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### EDUCATION

**International Project Management Certificate**, University of Toronto, May 2001 – Present

- Courses in Foundation of Project Management, Leading Projects and Organizations, Program and Portfolio Management, Managing International Projects.

**Research and Development Program Diploma**, Toronto Institute of Pharmaceutical Technology, 2007

- Graduated with distinction.

**Honors Bachelor of Science**, University of Toronto, 2005

- Double major in Biology and Chemistry
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### ACCOMPLISHMENTS

**Presidents Award of Excellence**, Excel Funds Management Inc., May 2008