

## EDUCATION

Wilfrid Laurier University	Waterloo, Canada
<i>Bachelor of Arts, Major in Economic and Accounting, Minor in Financial Mathematics</i>	Sept. 2020 – June 2024

## EXPERIENCE

<b>Advisor Insights</b>	Toronto, Canada
<i>Research Analyst</i>	June 2024 - Present
<ul style="list-style-type: none"><li>Created presentations for over 1,500 growing newsletter subscribers and investors, offering insights on fundamental analysis and current macroeconomic outlooks.</li><li>Conducted comprehensive market, financial, and economic trend analysis, utilizing Excel, Stata, and Python for data mining and analysis.</li><li>Completed a detailed report on the Big 6 Canadian banks, examining the effects of recessions, interest rates, and other macroeconomic factors on the banking sector.</li><li>Improved charting skills and attention to detail while analyzing financial statements of the Big 6 Canadian banks, determining their investment potential.</li></ul>	

<b>Digicel Headquarters</b>	Kingston, Jamaica
<i>Group Financial Planning and Analysis Intern</i>	Jul 2022 – Sept 2022
<ul style="list-style-type: none"><li>Conducted comprehensive financial data analysis and prepared the Q3 Quarterly Board Report and Bond Report presentation for the CFO</li><li>Researched and Compiled Data on International cryptocurrency for Legal Team using PowerBI and Stata</li><li>Developed a predictive model using R to forecast monthly subscriber counts across various national markets for Business Intelligence team which helped company decide if prices needs to change for competitiveness</li><li>Assisted in creating the 2022 ESG Report, outlining future compliance goals for Scopes 1,2 and 3</li></ul>	

<b>Proven Wealth</b>	Kingston, Jamaica
<i>Investment Analyst Intern</i>	Jul 2020 – Sept. 2020
<ul style="list-style-type: none"><li>Conducted in-depth research on blockchain technology to support development of new data systems</li><li>Managed a \$2M USD client portfolio of US equities and corporate and government bonds, enhancing understanding of bond ratings and durations to manage risk-averse client portfolios</li><li>Provided investment advice to over 20 clients with varying risk profiles on public equities within the Jamaica Stock Exchange (JSE)</li><li>Ensured meticulous file management, and prioritization of tasks to support daily operational activities.</li></ul>	

## LEADERSHIP EXPERIENCE

<b>Environmental Social Governance (ESG) Laurier</b>	Waterloo ON, Canada
<i>Vice President of ESG Research</i>	Sept.2023 – Present
<ul style="list-style-type: none"><li>Led a team in creating high-quality ESG Investment Content, demonstrating strong leadership and critical thinking skills</li><li>Developed and Launched an ESG Crash Course in collaboration with Laurier's Career Centre for co-op students, promoting ESG awareness</li><li>Oversaw the review and editing of <a href="#">articles</a> for publication on the ESG website</li></ul>	

<b>ESG Laurier</b>	Waterloo ON, Canada
<i>Director of ESG Research</i>	Sept.2022 – Sept.2023
<ul style="list-style-type: none"><li>Exemplified a high level of leadership and critical thinking through raising a team who can create ESG content</li><li>Authored articles on sustainable and investment-worthy companies for ESG website</li><li>Reviewed and edited team members' articles, ensuring high standards before publication</li></ul>	

## Professional Development

Bloomberg Market Concepts Certificate	Received May 2023
Bloomberg ESG Certificate	Received June 2023
Canadian Securities Course (CSC)	Currently Pursuing

## References

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Juan. S Morales	Associate Professor, <a href="mailto:jmorales@wlu.ca">jmorales@wlu.ca</a>