

Lucas Gordon

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EDUCATION

Queen's University – Smith School of Business

Bachelor of Commerce

Kingston, ON

Class of 2023

- **Academics:** 3.90 /4.30 GPA, relevant coursework includes Financial Accounting (A+), Statistics (A+), Calculus (A), Management Accounting (A+) and Business Decision Models (A+)
- **Awards:** D.I. McLeod Dean's List and Queen's University Entrance Scholarship recipient for achieving an entrance grade of 96%
- **International Exchange:** Scheduled to complete a semester abroad at Estonian Business School in Tallinn, Estonia in Winter 2022

EMPLOYMENT EXPERIENCE

InstarAGF Asset Management

Analyst, Infrastructure Direct Investing

Toronto, Canada

May 2021 – August 2021

- Scheduled to complete a 16-week internship with InstarAGF Asset Management, an infrastructure investment fund with ~\$3B in AUM

Grayhawk Investment Strategies

Analyst

Toronto, Canada

May 2020 – April 2021

- Grayhawk Investments is a multi-family office with ~ \$1B in AUM servicing high-net-worth families
- Worked directly with the Chief Investment Officer to launch a new \$150M alternatives pool by analyzing various private fund managers of alternative asset classes, such as private credit, private equity, real assets, distressed credit and venture capital
- Authored internal investment memorandums on private managers, which ultimately led to the creation of two alternative portfolios
- Constructed a detailed statistical performance analysis for private investments using software such as R Studio and Quantmod
- Received a return offer to continue employment on a part-time basis throughout the Fall and Winter academic semesters, assisting in further construction and analysis of two portfolios consisting of structured alternative managers and opportunistic alternative managers

EXTRACURRICULAR EXPERIENCE

Limestone Capital

Portfolio Manager, Natural Resources

Kingston, Canada

September 2019 – Present

- Limestone Capital is a premier student-run investment club that invests in value-focused U.S. and Canadian equities
- Lead a team of two Analysts to produce stock pitches containing industry analysis and financial modeling
- Selected as one of three freshman Analysts from a pool of 70 applicants; ultimately promoted to Portfolio Manager
- Built a comparable company analysis and discounted cash flow model for a buy recommendation pitch on MasTec (NYSE: MTZ), an American multinational infrastructure engineering and construction company
- Constructed a net asset value model, completed industry analysis and developed an investment thesis as part of a stock pitch on Lundin Mining (TSE: LUN), a long-standing copper and zinc mine operator

CREO Solutions

Managing Director

Kingston, Canada

September 2019 – Present

- CREO Solutions is a premier student-run consultancy serving businesses across North America
- Selected as one of two Managing Directors, leading a team of 32 members providing paid management consulting services
- Advised a Boston-based quick service restaurant chain with revenues of ~ \$13M by researching franchising strategies across the East Coast by collecting first-hand research through scheduled interviews; ultimately receiving 100% buy-in from company management

ADDITIONAL INFORMATION

- **Entrepreneurship:** Created a youth employment website for students in the Hamilton and Halton regions, amassing to 14,000+ total users and served numerous clients such as BeaverTails, YMCA and Pita Pit, later acquired by employment start-up GigIt
- **Technical Skills:** Excel, PowerPoint, Python, Java, R, and S&P Capital IQ
- **Community Initiative:** Founded Canada's only 24-hour high school case competition, welcoming 200+ high school students across Canada to solve a series of undergraduate level cases, directly managing a conference budget of ~ \$25,000
- **Projects:** Following the Toronto Raptors NBA victory, created a novelty cereal line "Kawhi O's" & "Lowry Loops" and distributed online
- **Distinctions:** Awarded Hamilton Youth Volunteer of the Year for the highest cumulative volunteer hours and community initiative in the City of Hamilton and awarded the Ontario Junior Citizen Award by the OCNA for outstanding community initiative and impact
- **Interests:** Creative writing, skiing (CSIA Level II), swimming, and Dean Martin