

One-Page Fit Memo — Brookfield Global Client Group (CRM)

Candidate: Drew Williams · Toronto, ON (relocation-ready) · 403-618-6113 ·
bdrewwilliams@gmail.com

Why Brookfield GCG

- Global client platform aligns with my investor communications background and analytics toolkit.
- Role's mix of CRM stewardship, reporting, and storytelling suits my experience building dashboards and executive decks.
- Keen to join a high-performing alternatives manager and support relationship teams across products.

Relevant Experience & Impact

- **Independent Builder:** designed investor update dashboards combining CRM data, KPIs, and pipeline information; automated narratives for leadership and clients.
- **Rosen Capital Advisors:** owned client-ready materials, coordinated cross-functional inputs, and led compliance/ops integration saving \$120K annually.
- **Private Equity Analyst:** prepared pitch materials and diligence summaries for \$350M–\$3.5B fundraises; maintained stakeholder trackers and follow-up actions.

How I Work

- Maintain meticulous data hygiene; document every field update and create reusable templates.
- Translate analytics into concise talking points and visual summaries for relationship managers and senior leaders.
- Automate repetitive workflows (Python/Excel) to improve response times and consistency.

Capabilities Snapshot

- CRM management, investor communications, fundraising analytics, KPI dashboards, executive storytelling.
- Excel (advanced), PowerPoint, CRM platforms (Salesforce familiarity), Python/automation scripts.
- Stakeholder coordination, process improvement, hybrid collaboration.

Availability

Ready to relocate to Toronto and support Brookfield's Global Client Group immediately.