

Drew Williams

Toronto, ON (relocation-ready) | 403-618-6113 | bdrewwilliams@gmail.com | LinkedIn: <https://www.linkedin.com/in/drew-williams-ai-strategy> | Portfolio: <https://www.itfrombit.ca>

PROFESSIONAL SUMMARY

Client solutions and analytics professional with investor communications experience, CRM literacy, and data-driven storytelling. Built executive decks, fundraising dashboards, and memo-ready investor updates for asset managers. Known for meticulous data hygiene, stakeholder coordination, and AI-enabled automation that speeds response time and deepens investor relationships.

CORE COMPETENCIES

Investor Communications; CRM Data Integrity; Fundraising Analytics; KPI Dashboards; Executive Storytelling; PowerPoint Production; Excel (advanced); Salesforce/CRM Workflow Familiarity; Stakeholder Coordination; Process Automation; AI-Assisted Content Drafting; Hybrid Collaboration.

EXPERIENCE

Independent Builder — AI & Financial Analytics · Calgary, AB | 2023–Present

- Constructed investor update dashboards combining CRM exports, fundraising KPIs, and portfolio data; automated narratives for leadership and clients.
- Developed templated decks and one-pagers highlighting performance drivers, pipeline, and strategic messaging tailored for investor audiences.
- Implemented data hygiene processes and automation scripts (Python/Excel) to expedite reporting and client communications.

Rosen Capital Advisors — Financial Analyst · Los Angeles, CA | 2016–2020

- Owned client-ready materials summarizing fund performance, risk positioning, and new offerings; ensured timely and accurate delivery to partners.
- Led compliance/ops integration reducing vendor spend by \$120K/year; improved data governance and reporting cadence.
- Maintained stakeholder trackers, meeting notes, and follow-up actions for investor relations and fundraising initiatives.

Private Equity (Summer Analyst) — Olson Cross & Alamo · New York, NY | 2015

- Produced investor memoranda, diligence summaries, and pitch materials for \$350M–\$3.5B fundraises; coordinated cross-functional inputs.

EDUCATION

Haskayne School of Business, University of Calgary · B.Comm, Finance (Distinction) | Graduated 2025

- GPA: 3.9/4.0 (last 90 units) · Haskayne Resilience Scholarship

SKILLS & KEYWORDS (ATS — BROOKFIELD GLOBAL CLIENT GROUP)

Investor Relations; Client Solutions; CRM; Salesforce; Fundraising Analytics; KPI Dashboards; PowerPoint; Excel; Communication; Stakeholder Management; Process Automation; Toronto; Hybrid.