

# Drew Williams

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## PROFESSIONAL SUMMARY

Portfolio management analyst with infrastructure and private equity exposure. Built asset-level dashboards, valuation oversight models, and governance packs for investment committees. Track capital plans, KPI trajectories, and risk mitigations across diversified portfolios. Combine finance skillset (B.Comm, Distinction) with Python/SQL automation to accelerate reporting and ensure standards for PSP's infrastructure & PE holdings.

## CORE COMPETENCIES

Portfolio Monitoring & Analytics; Valuation Oversight; Performance Reporting; KPI & Covenant Tracking; Governance & IC Materials; Scenario Analysis; Capital Plan Modeling; Excel (advanced); Python/SQL Automation; Power BI/Tableau; Stakeholder Coordination; Risk & Mitigation Narratives.

## EXPERIENCE

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

- Constructed portfolio dashboards tracking asset KPIs, capital programs, and valuation marks; automated data refresh and variance narratives for IC meetings.
- Developed governance templates summarizing performance drivers, risk highlights, and next steps for infrastructure and PE holdings.
- Implemented Python/SQL workflows to reconcile financial and operational data, ensuring accuracy and timeliness of reporting.

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

- Monitored portfolio company performance; prepared board materials covering KPIs, valuation updates, and strategic initiatives.
- Led compliance/ops integration reducing vendor spend by \$120K/year and reinforcing data governance for portfolio reporting.
- Developed scenario models for capital allocation, liquidity planning, and risk mitigation; presented recommendations to partners.

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

- Drafted portfolio review memos, valuations, and risk assessments for \$350M–\$3.5B infrastructure and PE investments.

## 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 — PSP PORTFOLIO MANAGEMENT)

Portfolio Management; Infrastructure; Private Equity; Valuation Oversight; KPI Tracking; Governance; Investment Committee; Scenario Analysis; Capital Planning; Excel; Python; SQL; Power BI; Tableau; Risk Management; Montréal.