

Drew Williams

Calgary, AB (relocation-friendly to Edmonton) | 403-618-6113 | bdrewwilliams@gmail.com | LinkedIn:
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PROFESSIONAL SUMMARY

Performance analytics professional with institutional-grade reporting experience. Built attribution dashboards, benchmark comparisons, and memo-first reporting for investment committees. Skilled at reconciling data across custodians, enforcing controls, and presenting insights to senior stakeholders. Combines finance training (B.Comm, Distinction) with Python/SQL automation to accelerate monthly and quarterly performance packages.

CORE COMPETENCIES

Performance Measurement & Attribution; Benchmarking; KPI Frameworks; Data Quality & Controls; Institutional Reporting; Executive Memos; Excel (advanced); Python/SQL Automation; BI Dashboards (Power BI/Tableau); Variance Storytelling; Stakeholder Communication; Process Improvement.

EXPERIENCE

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

- Created performance measurement suite consolidating returns, benchmarks, and attribution drivers; automated variance narratives for CIO audiences.
- Implemented Python/SQL workflows to reconcile data sources, flag anomalies, and ensure controls for reporting cycles.
- Produced quarterly reports and dashboards for asset owners detailing risk-adjusted performance, KPI trends, and action recommendations.

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

- Maintained P&L and VaR dashboards integrating market and operational data; provided attribution insights to partners and risk committees.
- Led compliance/ops platform integration reducing vendor spend by \$120K/year; strengthened reporting cadence and data governance.
- Delivered IC-ready narratives summarizing performance drivers, scenario analysis, and mitigation plans.

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

- Produced investment memoranda highlighting manager performance, benchmarks, and risk factors for \$350M–\$3.5B transactions.

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 — AIMCO PERFORMANCE MEASUREMENT)

Performance Measurement; Attribution; Benchmarks; Institutional Reporting; Data Quality; Controls; Excel; Python; SQL; Power BI; Tableau; KPI; Risk-Adjusted Metrics; Executive Communication; Edmonton; Hybrid.