

One-Page Fit Memo — PSP Portfolio Management (Infrastructure & Private Equity)

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

Why PSP Portfolio Management

- Complex, global portfolio with rigorous governance fits my experience in asset-level analytics and executive reporting.
- Excited to partner with infrastructure and PE deal teams to track capital plans, KPIs, and valuation marks.
- Motivated by long-term ownership mindset and opportunity to support IC processes with timely insights.

Relevant Experience & Impact

- **Independent Builder:** crafted portfolio dashboards tracking KPIs, capital programs, and valuation movements; automated variance narratives for IC meetings.
- **Rosen Capital Advisors:** prepared board materials and scenario models for portfolio companies; led compliance/ops integration that improved reporting cadence and saved \$120K annually.
- **Private Equity Analyst:** drafted portfolio review memos and risk assessments for \$350M–\$3.5B investments, aligning sponsors and operators on action plans.

How I Work

- Maintain disciplined data reconciliation and documentation for every update.
- Engage cross-functional partners early to validate assumptions and surface emerging risks.
- Present concise, decision-ready materials tailored to IC expectations.

Capabilities Snapshot

- Portfolio analytics, valuation oversight, KPI/covenant tracking, governance reporting.
- Excel (advanced), Python, SQL, Power BI/Tableau; PowerPoint storytelling.
- Stakeholder coordination, risk escalation, change management.

Availability

Prepared to relocate to Montréal and contribute immediately to PSP's portfolio management team.