

Drew Williams

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PROFESSIONAL SUMMARY

Manager research analyst with memo-first diligence habits, strong financial modeling, and a track record of evaluating external strategies. Built qualitative/quantitative scorecards, monitored performance versus benchmarks, and drafted investment committee recommendations for alternative asset mandates. Comfortable engaging with managers, tracking KPIs, and ensuring governance alignment for PSP's external manager platform.

CORE COMPETENCIES

External Manager Due Diligence; Qualitative/Quantitative Evaluation; Performance Monitoring; Benchmark Analysis; Risk Assessment; Investment Committee Memos; Relationship Management; Excel/Python Modeling; Data Room Analysis; AI-Assisted Research; Stakeholder Communication.

EXPERIENCE

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

- Developed manager evaluation framework combining qualitative scoring, factor exposures, and downside analysis; produced recommendation memos for asset owners.
- Implemented Python/SQL tools to monitor performance, risk, and guideline compliance; automated dashboards for ongoing oversight.
- Coached clients on diligence processes, meeting agendas, and documentation standards for external manager reviews.

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

- Assessed external funds and co-investments; synthesized track records, strategy fit, and operational diligence into investment committee packages.
- Maintained performance dashboards, monitor lists, and periodic review cadence for manager relationships.
- Led compliance/ops integration reducing vendor spend by \$120K/year and reinforcing data governance for third-party providers.

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

- Prepared diligence memos covering fund managers, strategy updates, and risk considerations for \$350M–\$3.5B allocations.

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 EXTERNAL MANAGER SELECTION)

External Manager Selection; Monitoring; Due Diligence; Performance Analysis; Benchmarks; Risk Management; Investment Committee; Qualitative Assessment; Quantitative Scoring; Excel; Python; SQL; Memos; Relationship Management; Montréal; Hybrid.