Drew Williams

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Professional Summary

Quant-trained analyst with experience in corporate finance, due diligence, and valuation, plus hands-on build of AI-enabled analytics tooling (Python/SQL dashboards, valuation engines). At Rosen Capital Advisors, led a compliance/operations platform integration that reduced vendor spend by $120K annually. Private Equity summer analyst experience reviewing $350M to $3.5B transactions, building IRR/waterfall models, and drafting investment committee-ready memoranda. B.Comm (Finance, with Distinction). Target role: Analyst/Consultant, Technology, Strategy & Transformation (Deloitte); strengths in technology strategy, operating models, and business-IT alignment.

Core Competencies

Technology Strategy; Operating Model Design; Requirements Gathering; Roadmapping; Portfolio Triage; Agile Fundamentals; SDLC Familiarity; Business Case Development; KPI Frameworks; Financial Modeling (DCF, IRR, EPV, Waterfalls); Scenario & Sensitivity Analysis; Executive Storytelling; Data Analysis; Dashboard Prototyping; SQL; Python; Excel (XLOOKUP, Index/Match, Pivots, Power Query); Power BI/Tableau (prototyping); Cloud Concepts; ERP/Enterprise Apps; Stakeholder Management; Communication; Prioritization under Tight Timelines; AI-Assisted Analysis & Drafting; No-Code Automations.

Experience

Independent Builder - AI and Financial Software

Calgary, AB | 2023-Present

itfrombit.ca | prairiesignal.ca

Prototyped valuation and risk analytics (Python/Excel) and a lightweight FP&A workbench; built memo-first reporting flows and scenario toggles for repeatable analysis.

Advised SMBs on technology enablement (Prairie Signal): AI use-cases, no-code automations, and simple dashboards aligned to business KPIs; translated ambiguous needs into requirements and pilot roadmaps.

Delivered executive-ready packs with baseline metrics, variance hygiene, and decision options; emphasized reproducibility and documentation for stakeholders.

Rosen Capital Advisors - Financial Analyst

Los Angeles, CA | 2016-2020

Led due diligence and compliance integration; reduced vendor spend by $120K per year; improved reporting cadence across Legal, IT, and Operations.

Built P&L and VaR dashboards integrating trade and risk data; accelerated analysis cycles for partners; supported investment committee materials and stakeholder communications.

Coordinated cross-functional inputs; aligned assumptions, reconciliations, and version control to enable repeatable analysis.

Private Equity (Summer Analyst) - Olson Cross and Alamo

New York, NY | 2015

Analyzed $350M to $3.5B transactions; built IRR and waterfall models; drafted investor memoranda and diligence summaries.

Education

Haskayne School of Business, University of Calgary

B.Comm, Finance (with Distinction) | Graduated 2025

GPA: 3.9/4.0 (last 90 units)

Haskayne Resilience Scholarship

Skills (Detailed)

Technology Strategy and Transformation:

business-IT alignment; requirements elicitation; roadmaps; operating model thinking (product/platform); scaled agile fundamentals; SDLC familiarity; portfolio/initiative triage.

Analytics and Financials:

DCF, EPV, IRR/waterfalls; business cases; KPI frameworks; scenario and sensitivity analysis; executive storytelling.

Data and BI:

Excel (advanced: XLOOKUP, Index/Match, PivotTables, Power Query); PowerPoint; SQL; Python; dashboard prototypes (Power BI/Tableau).

Cloud and Enterprise (familiarity):

cloud concepts and infrastructure; ERP and enterprise applications; digital workplace technologies.

AI and Automation:

generative AI for analysis and drafting; no-code automations; prompt-first workflows; reproducible analyses.

Soft Skills:

clear communication; stakeholder engagement; ambiguity navigation; prioritization under tight timelines.

Additional Information

Exposure to enterprise stacks (Oracle EPM/Hyperion), modern BI, and cloud/infrastructure concepts; comfortable learning client-specific tools.

Writing-first approach: concise one-pagers, decision memos, and reconciled decks for leadership audiences.

Other: operating model; SDLC/product-platform; cloud and enterprise applications.

Keywords for ATS

Deloitte; Technology Strategy; TS&T Operating Model; Target Operating Model (TOM); Business-IT Alignment; Enterprise Architecture (awareness); Cloud Strategy; ERP; Digital Workplace; SDLC; Agile; Product Management; Portfolio Management; Business Case; KPI; Financial Modeling; DCF; IRR; EPV; Waterfall Model; Due Diligence; Valuation; SQL; Python; Excel; Power BI; Tableau; Stakeholder Management; Change Management; Requirements; Roadmap; Governance.