Drew Williams

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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

Professional Summary

Client solutions and analytics professional with investor communications experience, CRM literacy, and data-driven storytelling. Built executive decks, fundraising dashboards, and memo-first updates for asset managers. Led a compliance/ops integration that reduced vendor spend by

$120K annually

while tightening governance. Known for meticulous data hygiene, stakeholder coordination, and AI-enabled automation that deepens investor relationships.

— Targeting

Analyst/Associate, Global Client Group (CRM)

at

Brookfield

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Core Skills & Tools

Investor Communications:

tailored decks, one-pagers, KPIs, narrative alignment for fundraising and client updates.

CRM & Data Integrity:

Salesforce familiarity, field governance, segmentation, process documentation.

Analytics & Automation:

Excel (advanced), Python, Power BI/Tableau prototypes, AI-assisted drafting.

Stakeholder Coordination:

cross-functional inputs (product, legal, ops), meeting facilitation, follow-up cadence.

Process Improvement:

automation scripts, template libraries, SLA tracking, hybrid collaboration rhythms.

Experience

Independent Builder — AI & Financial Software

Calgary, AB · 2023–Present

itfrombit.ca · prairiesignal.ca

Constructed investor update dashboards combining CRM exports, fundraising KPIs, and portfolio data; automated narratives for leadership and clients.

Developed templated decks and one-pagers highlighting performance drivers, pipeline, and strategic messaging tailored for investor audiences.

Implemented data hygiene processes and automation scripts (Python/Excel) to expedite reporting and client communications.

Rosen Capital Advisors — Financial Analyst

Los Angeles, CA · 2016–2020

Owned client-ready materials summarizing fund performance, risk positioning, and new offerings; ensured timely, accurate delivery to partners.

Led compliance/ops integration reducing vendor spend by

$120K/year

; improved data governance and reporting cadence.

Maintained stakeholder trackers, meeting notes, and follow-up actions for investor relations and fundraising initiatives.

Private Equity (Summer Analyst) — Olson Cross & Alamo

New York, NY · 2015

Produced investor memoranda, diligence summaries, and pitch materials for $350M–$3.5B fundraises; coordinated cross-functional inputs.

Additional Information

Comfortable maintaining CRM hygiene, task queues, and segmentation fields to support personalized outreach.

Writing-first approach: concise investor updates, talking points, and call notes with clear next steps.

Other:

operating model alignment · SDLC familiarity · cloud & enterprise apps exposure.

ATS Keywords

Investor Relations; Client Solutions; CRM; Salesforce; Fundraising Analytics; KPI Dashboards; PowerPoint; Excel; Communication; Stakeholder Management; Process Automation; Toronto; Hybrid.