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

Manager research analyst with memo-first diligence habits, quantitative toolset, and experience evaluating external strategies. Built qualitative and quantitative scorecards, monitored performance versus benchmarks, and drafted IC recommendations for alternative mandates. Led a compliance/ops integration that reduced vendor spend by

$120K annually

while strengthening governance. Comfortable engaging with managers, tracking KPIs, and aligning documentation with PSP’s external manager platform.

— Targeting

Analyst/Senior Analyst, External Manager Selection & Monitoring

at

PSP Investments

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Core Skills & Tools

Diligence & Monitoring:

qualitative/quantitative scoring, reference checks, guideline compliance tracking.

Performance Analytics:

benchmark construction, factor analysis, downside scenario modelling, variance narratives.

Data & Automation:

Excel (advanced), Python, SQL; dashboards and alerts for ongoing oversight.

Governance & Documentation:

memo-first storytelling, IC-ready materials, relationship tracking.

Stakeholder Skills:

manager engagement, follow-up cadence, cross-functional coordination (legal, ops, risk).

Experience

Independent Builder — AI & Financial Software

Calgary, AB · 2023–Present

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Developed manager evaluation frameworks 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 IC packages.

Maintained performance dashboards, monitor lists, and periodic review cadence for manager relationships.

Led compliance/operations 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.

Additional Information

Experienced running meeting cadences, reference calls, and follow-ups to keep manager files current.

Writing-first approach: concise diligence notes, decision memos, tracked action items.

Other:

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

ATS Keywords

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.