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

Portfolio management analyst with infrastructure and private equity exposure. Built asset-level dashboards, valuation oversight models, and governance packs that keep investment, finance, and risk aligned. Led a compliance/ops integration that reduced vendor spend by

$120K annually

while tightening cadence and controls. Track capital plans, KPIs, and risk mitigations across diversified holdings, pairing finance training (B.Comm, Distinction) with Python/SQL automation to meet PSP’s governance standards.

— Targeting

Analyst/Senior Analyst, Portfolio Management

at

PSP Investments

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Core Skills & Tools

Portfolio Analytics:

KPI dashboards, capital plan tracking, valuation oversight, variance narratives.

Reporting & Governance:

board/IC materials, covenant monitoring, risk escalation, documentation discipline.

Data & Automation:

Excel (advanced), Python, SQL, Power BI/Tableau prototypes; automated refreshes.

Scenario Planning:

capital allocation, liquidity stress tests, downside protections.

Stakeholder Skills:

coordination with deal teams, operations, finance, and risk partners; change enablement.

Experience

Independent Builder — AI & Financial Software

Calgary, AB · 2023–Present

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Constructed portfolio dashboards tracking asset KPIs, capital programs, and valuation marks; automated data refresh and variance narratives for IC meetings.

Developed governance templates summarizing performance drivers, risk highlights, and next steps for infrastructure and PE holdings.

Implemented Python/SQL workflows to reconcile financial and operational data, ensuring accuracy and timeliness of reporting.

Rosen Capital Advisors — Financial Analyst

Los Angeles, CA · 2016–2020

Monitored portfolio company performance; prepared board materials covering KPIs, valuation updates, and strategic initiatives.

Led compliance/ops integration reducing vendor spend by

$120K/year

and reinforcing data governance for portfolio reporting.

Developed scenario models for capital allocation, liquidity planning, and risk mitigation; presented recommendations to partners.

Private Equity (Summer Analyst) — Olson Cross & Alamo

New York, NY · 2015

Drafted portfolio review memos, valuations, and risk assessments for $350M–$3.5B infrastructure and PE investments.

Additional Information

Comfortable partnering with operations and finance to reconcile KPI definitions and ensure data integrity.

Writing-first approach: concise portfolio updates, decision memos, reconciled decks for leadership.

Other:

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

ATS Keywords

Portfolio Management; Infrastructure; Private Equity; Valuation Oversight; KPI Tracking; Governance; Investment Committee; Scenario Analysis; Capital Planning; Excel; Python; SQL; Power BI; Tableau; Risk Management; Montréal.