Alexander J. Duria

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Investment Associate at TD Private Investment Counsel & level 2 Candidate in the CFA Program. Currently seeking & actively progressing towards new opportunities in software development.

Technical Skills

Proficient with: JavaScript (ES6) • React/Redux • NodeJS • MongoDB • Express • HTTP & REST (GraphQL) • HTML & CSS3 • Git • Excel (VLOOKUP, VBA) • Microsoft Office Suite

Familiar with: TypeScript • Python 3 • React Native • Django • Docker • Java • Vue • Gatsby

Soft Skills

• Self-starter mentality with proven track-record of professionalism, integrity & attention to detail
• Confidence & experience in working both independently & in a structured & agile team environment, as well as comfortable assuming leadership roles where appropriate
• Commitment to curiosity, a life-long pursuit of learning, development & continuous improvement

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Work Experience

TD Private Investment Counsel
Investment Associate *Nov 2020 – Present*

- Continued development of strategic business initiatives through assisting in comprehensive portfolio management of $450+ million in discretionary assets with an annual recurring revenue of over $4.0 million.
- Further development towards Portfolio Manager track through structuring & management of existing or prospective client portfolios with both self-developed excel models & proprietary firm software.
- Manual rebalancing of portfolios based on tactical asset allocation events with focus on maintaining client specific asset allocation parameters & adjusting for systematic & non-systematic risk exposures.
- Assists in the process of new business acquisition by means of developing custom client proposals, pitch deck materials & comprehensive financial planning based on detailed analysis of external client assets while factoring in a wide range of holistic wealth considerations.

TD Private Investment Counsel
Private Client Service Associate *July 2018 – Nov 2020*

- Responsible for managing existing & new client relationships as the secondary point of contact for all matters relating to performance data, investment structure, cash flow requirements & KYC documentation.
- Create comprehensive Annual Client Review packages that include custom client performance reporting, KYC documentation, Investment Policy Statements & current & proposed asset weightings & structure.

- Participates in the creation & structuring of existing & prospective client portfolios through both self-developed excel portfolio models & firm software (MPOWER, PAC tool), as well as the manual rebalancing of portfolios through trade implementation.

Education

CFA Level II Candidate, *CFA Institute* *Nov 2021*

CIM Candidate, *Canadian Securities Institute* *August 2021+*

- Course work completed in CSC, PMT & currently enrolled in the IMT for completion in 2021.

Ryerson University – Ted Rogers School of Accounting & Finance
Bachelor of Commerce: Finance *Sept 2013 – Dec 2017*

- **Relevant Coursework:** Financial Statement Analysis, Advanced Financial Management, Financial Modeling, Fixed Income, Options, Futures & Derivatives, Financial Planning, International Finance, Investments Analysis & Real Estate Finance.
- **Awards:** Deans List 2015, 2016

RMIT University – International Finance
International Exchange Program *Jan 2017 – Aug 2017*

- **Relevant Coursework:** Financial Modeling, Investment Analysis & International Finance.
- Successfully completed a semester of business courses & applied portfolio management theory towards internal mock portfolio competition, with a return of 2%~ over the ASX200 benchmark during the relevant 11-week measurement period.
- Member of RMIT Economics, Finance & Accounting Student Association.