



JAGPREET SINGH

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Results-driven business analyst with experience in process improvements and automation to enhance operational efficiency and business performance of organizations. With more than 7 years of progressive experience within the asset management space combined with an education in Business, Economics, Math, and Statistics, I bring a unique blend of skills and knowledge to the table. Committed to continuous learning and staying current with industry trends to deliver innovative solutions. Seeking to leverage my expertise to drive business growth and add value to a dynamic organization.

WORK EXPERIENCE

Business Solutions Analyst

Burgundy Asset Management, Aug 2022 - Jan 2024

- **Instruction Entry Project:** Collaborated with the developers and business stakeholders across multiple teams in a project to transition the existing trade and transaction entry operations from a legacy software "Answers" to an in-house solution built on Microsoft Dynamics using PowerApps.
 - Gathered, updated, maintained requirements on Confluence.
 - Created process flows and Visio and screen mock-ups using Balsamiq.
 - Conducted testing, reported bugs, and logged enhancements using JIRA.
- **Client Profile Renewal Project:** Worked with business partners in the Private Client Group on a project to streamline and automate the electronic delivery of KYC and regulatory documents to the client.
 - Gathered requirements, conducted mapping exercises, analysed documents, and created workflow diagrams.
 - Assisted in the vendor selection process by helping create request for proposals, participating in vendor demos and proof of concept requirement meetings.
- Automated ticketing of support requests by setting up mail handlers on JIRA such that incoming emails into the outlook support mailbox are converted into JIRA tickets and any responses to the emails are automatically added as comments on the ticket.
- Helped create SharePoint FAQ site pages for end users to use post release.

Business Analyst

IGM Financial, Dec 2021 – Aug 2022

- **Project to migrate newly acquired client data to Salesforce:** Collaborated with stakeholders from the client relations department to gather requirements for data migration into Salesforce for the newly acquired clients from the acquisition of Greenchip Financial by Mackenzie Financial Corporation.
- **Investment Incentive Compensation Project:** HR project to automate the incentive calculation for Investment Analysts and Portfolio Managers. Joined this project at a later stage and helped maintain and update requirements and worked with developers and the HR stakeholders with bug fixes and enhancements during the testing stage.

Senior Specialist, Asset Management, Operations & Corporate Services

IGM Financial, Dec 2020 -Dec 2021

- Demonstrated subject matter expertise for Investors group, Mackenzie Investments and Canada life Charitable Giving Program.
- Led improvement initiatives for the department to continually enhance the service offering.
- Reviewed all complex/exception-based situations and prepared recommendation on decision to address issue considering regulatory and operational best practice.
- Conducted quality control activities to ensure data accuracy and consistency.

Associate, Client Solutions

IGM Financial, Mar 2018 – Jan 2020

- Built and managed dealer and advisor relationship with Mackenzie Investments.
- Resolved discrepancies by coordinating with dealers and advisors.
- Performed account management for client accounts.
- Processed documents received according to the Mackenzie policy and procedures and compliance guidelines.

Coordinator, Client Solutions

IGM Financial, Jan 2016 – Mar 2018

- Performed account management and servicing activities for client account.
- Interpreted and analysed documentation for input and processing of registered and non-registered investment transactions.
- Operated information retrieval systems to research and extract records according to established guidelines in response to requests.

EDUCATION & CERTIFICATIONS

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| ▪ Bachelor of Science, Economics, Math & Statistics
University of Toronto, St. George Campus | ▪ McGill Personal Finance Essential
McGill University |
| ▪ Business, Diploma
Centennial College | ▪ Canadian Investment Fund Course
IFSE Institute |
| ▪ Agile Leader Certified
Six Sigma Global Institute | ▪ Competent Communicator Certification
Toastmasters International |
| ▪ Business Analysis Certificate (course 1/3)
University of Toronto | ▪ Toastmasters International Winner, Area, and
Division contest |