**COVER PAGE**

I have included two versions of my resume:

1. **One-page version** of the resume that I have used in the past to look for work in finance.
2. **Two-page version** of my resume that is currently in draft form, that I have started to develop recently:

- I am hoping to get initial feedback on the initial draft of the two-page resume that I have created to ensure I am on the right track with the changes I have already implemented (before spend time with format, word choice, etc.)

- I suspect that relatively, I am a bit of an older candidate as I have a lot of education and work experience, but am look at making a change in the direction of my career. Hence, my thought is to go to two pages (but would welcome you thoughts on sticking with one or going with two pages).

- My thought with two pages is to allow me to:

1. add education (Lighthouse labs and other development / IT courses I have planned)
2. add an objective / executive summary section at the top of the first page to note my change in careers and to focus reader on IT education and IT project experience
3. add an IT project experience spot up front – I managed four large/larger IT projects in addition to my regular duties]

I would appreciate any feedback – additional suggestions you would care to provide related to the executive summary and the employment / experience sections.

**ONE-PAGE RESUME**

**(NEXT PAGE)**

**EMPLOYMENT**

**ALTACORP CAPITAL INC Calgary**

**Director, Debt Capital Markets Calgary 2017– 2019**

* Managed Energy, Utility and Diversified investment and non-investment grade issuer relationships
* Advised senior management teams on market trends and issuance strategies in North American debt markets
* Sourced, structured, and distributed corporate private placements and infrastructure/project finance bonds in Canada and USA

**RBC CAPITAL MARKETS London, New York, Toronto, Calgary**

**Director, Debt Capital Markets London 2007– 2010**

* Managed key client relationships as the senior originator in the London Supra, Sovereign and Agency group
* Executed Australian, European, Canadian and US domestic AAA rated debt transactions in more than nine currencies
* Directed a 12-person technology team in the creation of a $3 million global debt origination information system

**Vice President, Debt Capital Markets New York, Toronto 2004 – 2006**

* Led more than 80 debt transactions ($12 billion) and contributed to more than 400 deals ($44 billion)
* Expanded US client base in the Real Estate, Mining and Consumer Products sectors resulting in fees being
* earned while participating in bond transactions totaling more than $12 billion in debt capital raised
* Managed key client relationships such as Caterpillar, John Deere, Honda, Toyota, Ford, Chrysler, GM, Aon,
* BHP Billiton, Dow Chemical, Johnson & Johnson, Home Depot, Coca Cola, UPS, and Disney

**Head of Generalist Program Toronto 2001 – 2006**

* Select by senior management to hire, train and mentor 22 members of a two-year rotational training program

**Associate, Debt Capital Markets Toronto 2000 – 2003**

* Assisted with client coverage in the Insurance, Bank and Non-Bank Financials, Utilities and Energy
* Participated in the development of funding programs such as the Canadian Mortgage Bond program ($550+ billion)
* Developed an IT system for Origination, Syndication and Trading automating pitch book creation and transaction analysis

**Generalist Rotational Program Toronto, Calgary 1999 – 2000**

* Graduated program completing rotations in Corporate Finance (Oil & Gas – Calgary office), Equity Research

(Non-Bank Financials), Equity Sales &Trading (Institutional) and Debt Capital Markets (Corporate Debt)

**ADDITIONAL EMPLOYMENT EXPERIENCE Edmonton, Calgary, Vancouver**

**Managing Director | Founder – FE Group of Companies Calgary, Edmonton 2010 – 2020**

* Founded a venture-builder organization and consultancy advising on strategy, finance, and operations
* Established a Fintech consumer asset-based lending operation sourcing operating, warehouse and securitization facilities
* Advised a multi-award-winning digital health/social entrepreneur specializing in supporting children with special needs
* Sourced funding, doubling the company’s financial resources while re-organizing capital structure for tax efficiencies

**Fixed Income and Equities - Phillips, Hager & North Investment Management Vancouver 1998 – 1998**

* Invested over $1 billion per week as a member of the market desk; analyzed Canadian and US public equities

**EDUCATION**

**DESIGNATIONS - CFA, ERP, DMS, CIM, FCSI Toronto, Calgary**

**Canadian Securities Institute Calgary 2010 – Present**

* Invited to be a Fellow of Canadian Securities Institute (FCSI®)
* Obtained Derivatives Market Specialist (DMS®) and Chartered Investment Manager (CIM®) designations

**Global Association of Risk Professionals**   **Calgary 2010 – Present**

* Awarded the designation of Energy Risk Professional (ERPTM)

**CFA Institute Toronto, Calgary 2003 – Present**

* Chartered Financial Analyst® (CFA®) Charterholder

**DEGREE - BACHELOR OF COMMERCE (with Distinction, Finance) Calgary**

**Haskayne School of Business, University of Calgary 1997 – 1999**

* Selected for Calgary Portfolio Management Trust (CPMT) and Inter-Collegiate Business Competition (I.C.B.C.) - Finance
* Awarded Louise McKinney Scholarship and Kelly Hurd Gibson Fellowship Scholarships for academic achievement
* Instructed 500 students in weekly three-hour lectures as the sole Finance and Operations Management Teaching Assistant

**ADDITIONAL**

* An enthusiastic supporter of children’s charities: six years mentoring at Calgary’s Young Offenders Center; $45,000 raised for Juvenile Diabetes Research Foundation, and ten months living and mentoring in an Australian children’s orphanage
* Other interests: martial arts (Muay Thai, Brazilian Jiu Jitsu, Silat, Wing Chun, Jun Fan Jeet Kune Do and Filipino Martial Arts), travel, photography, scuba diving, beach volleyball, road biking, squash, and ice climbing

**TWO-PAGE RESUME**

**(NEXT PAGE)**

**EXECUTIVE SUMMARY**

Leading national expert in global capital markets delivering profitable financing solutions to corporate leaders

**EMPLOYMENT**

**IT DEVELOPMENT EXPERIENCE Toronto, London, Calgary**

**Project 1: AI Fixed Income Pricing Application Calgary 2018– 2019**

* Developed an analysis and reporting system for debt origination utilizing AI in the pricing of fixed income securities

**Project 2: Global Debt Capital Markets Origination & Fixed Income Master London 2007– 2008**

* Directed a 12-person technology team in the creation of a $3 million global debt origination information system

**Project 3: Canadian Debt Capital Markets Origination Information System Toronto 2001– 2004**

* Developed an IT system for Origination, Syndication and Trading automating pitch book creation and transaction analysis

**Project 4: Canadian Equity Sales and Trading Guidance Application Toronto 1999– 2000**

* Developed an IT system for Equity Sales and Trading streamlining the collection of Analysts’ earnings estimates and the automatic generation of client

**ALTACORP CAPITAL INC Calgary**

**Director, Debt Capital Markets Calgary 2017– 2019**

* Managed Energy, Utility and Diversified investment and non-investment grade issuer relationships
* Advised senior management teams on market trends and issuance strategies in North American debt markets
* Sourced, structured, and distributed corporate private placements and infrastructure/project finance bonds in Canada and USA

**RBC CAPITAL MARKETS London, New York, Toronto, Calgary**

**Director, Debt Capital Markets London 2007– 2010**

* Managed key client relationships as the senior originator in the London Supra, Sovereign and Agency group
* Executed Australian, European, Canadian and US domestic AAA rated debt transactions in more than nine currencies
* Directed a 12-person technology team in the creation of a $3 million global debt origination information system

**Vice President, Debt Capital Markets New York, Toronto 2004 – 2006**

* Led more than 80 debt transactions ($12 billion) and contributed to more than 400 deals ($44 billion)
* Expanded US client base in the Real Estate, Mining and Consumer Products sectors resulting in fees being
* earned while participating in bond transactions totaling more than $12 billion in debt capital raised
* Managed key client relationships such as Caterpillar, John Deere, Honda, Toyota, Ford, Chrysler, GM, Aon,
* BHP Billiton, Dow Chemical, Johnson & Johnson, Home Depot, Coca Cola, UPS, and Disney

**Head of Generalist Program Toronto 2001 – 2006**

* Select by senior management to hire, train and mentor 22 members of a two-year rotational training program\

**Associate, Debt Capital Markets Toronto 2000 – 2003**

* Assisted with client coverage in the Insurance, Bank and Non-Bank Financials, Utilities and Energy
* Participated in the development of funding programs such as the Canadian Mortgage Bond program ($550+ billion)
* Developed an IT system for Origination, Syndication and Trading automating pitch book creation and transaction analysis

**Generalist Rotational Program Toronto, Calgary 1999 – 2000**

* Graduated program completing rotations in Corporate Finance (Oil & Gas – Calgary office), Equity Research

(Non-Bank Financials), Equity Sales &Trading (Institutional) and Debt Capital Markets (Corporate Debt)

**ADDITIONAL EMPLOYMENT EXPERIENCE Edmonton, Calgary, Vancouver**

**Managing Director | Founder – FE Group of Companies Calgary, Edmonton 2010 – 2020**

* Founded a venture-builder organization and consultancy advising on strategy, finance, and operations
* Established a Fintech consumer asset-based lending operation sourcing operating, warehouse and securitization facilities
* Advised a multi-award-winning digital health/social entrepreneur specializing in supporting children with special needs
* Sourced funding, doubling the company’s financial resources while re-organizing capital structure for tax efficiencies

**Fixed Income and Equities - Phillips, Hager & North Investment Management Vancouver 1998 – 1998**

* Invested over $1 billion per week as a member of the market desk; analyzed Canadian and US public equities

**EDUCATION**

**DIPLOMA – WEB DEVELOPMENT, Computer Software Engineering Calgary**

**Lighthouse Labs Calgary 2022 – 2023**

* Completed a comprehensive 30-week software development program focus on full-stack web development
* Obtain broad range of skills in successful application development, computer science and software engineering from a program approved by the Canadian Private Training Institutions Branch of the Ministry of Advanced Education and Skills Training
* Demonstrated proficiency application development by writing clear accessible code while employing modern languages, frameworks and libraries including JavaScript & Node.js, HTML5 and CSS3, React JS as well as Ruby on Rails.
* Obtained experience with efficient algorithm design, object-oriented programming as well as source code version control and organization while performing modular test-driven development

**DESIGNATIONS - CFA, ERP, DMS, CIM, FCSI Toronto, Calgary**

**Canadian Securities Institute Calgary 2010 – Present**

* Invited to be a Fellow of Canadian Securities Institute (FCSI®)
* Obtained Derivatives Market Specialist (DMS®) and Chartered Investment Manager (CIM®) designations

**Global Association of Risk Professionals**   **Calgary 2010 – Present**

* Awarded the designation of Energy Risk Professional (ERPTM)

**CFA Institute Toronto, Calgary 2003 – Present**

* Chartered Financial Analyst® (CFA®) Charterholder

**DEGREE - BACHELOR OF COMMERCE (with Distinction, Finance) Calgary**

**Haskayne School of Business, University of Calgary 1997 – 1999**

* Selected for Calgary Portfolio Management Trust (CPMT) and Inter-Collegiate Business Competition (I.C.B.C.) - Finance
* Awarded Louise McKinney Scholarship and Kelly Hurd Gibson Fellowship Scholarships for academic achievement
* Instructed 500 students in weekly three-hour lectures as the sole Finance and Operations Management Teaching Assistant

**ADDITIONAL**

* An enthusiastic supporter of children’s charities: six years mentoring at Calgary’s Young Offenders Center; $45,000 raised for Juvenile Diabetes Research Foundation, and ten months living and mentoring in an Australian children’s orphanage
* Other interests: martial arts (Muay Thai, Brazilian Jiu Jitsu, Silat, Wing Chun, Jun Fan Jeet Kune Do and Filipino Martial Arts), travel, photography, scuba diving, beach volleyball, road biking, squash, and ice climbing