

# **Justin Shirer**

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## **Skills**

- Problem Solving • Leadership • Communication • Teamwork •
- Excel (VBA) • CFA Level 1 Candidate (August 2025) • MS Office • Python • Spanish •

## **Work Experience**

### **TD Wealth - National Office Co-op (Advisor Compensation)**

*Fall 2023, Summer 2024*

- Built an Excel application designed to demonstrate and adjust disparate impacts of compensation changes within advisor teams
- Spearheaded a project to segment TD Wealth advisors across the country for upper management analysis regarding how TD interacts with the field
  - This project involved in-depth analysis of the value of books of business to TD and an analysis of their anticipated future value
  - Presented my analytical findings to upper management and engaged in discussions regarding the project

### **IA Clarington - Data Analyst**

*Summer 2022*

- Collaborated with a team to migrate a CRM system by utilizing Excel and VBA skills to identify and clean up data issues, preventing problems during the migration process.
- Coordinated meetings with firm members to discuss identified issues with client records and worked diligently to resolve these issues.
- Handled a dataset of 10,000 clients and created multiple data archives for use in the future CRM system.
- Developed a systematic approach to data analysis, ensuring accuracy and completeness of all data sets analyzed through Excel with use of VBA code.

### **Master Seo's Dynamic Taekwondo - Assistant Instructor**

*2017 – 2020*

- Ensured smooth class operation, organized equipment and children employing organizational and teamwork skills which allowed the lead instructor to run class effectively.
- Lead class as a whole or in smaller groups utilizing leadership and public speaking skills leading to beneficial outcomes in children's ability in addition to strides they made as people.

## **Education**

### **Wilfrid Laurier University**

Honours Bachelor of Business Administration (Co-op)

*Expected Graduation: August 2025*

- Led financial analysis for BDO New Venture competition team, analyzing market research and financial projections to create a comprehensive business plan.
- Presented the team's detailed business plan to a panel of judges, earning recognition as finalists in a highly competitive pool of applicants.
- Computer Science Minor
- Coach and Treasurer with the Laurier Grappling Club