ALEXANDER MCGINN

CONTACT INFORMATION

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EDUCATION & PROFESSIONAL ACCREDITATIONS

McGill University	Bachelor of Science (Neuroscience Undergraduate Society, McGill Investment Club, Political Issues Club, Model UN)
CFA Institute	CFA Level III Candidate
RIA Canada	Responsible Investment Professional Certification (RIPC)
CAIA Association	Chartered Alternative Investment Analyst (CAIA)
Marquee Group	Accredited Financial Modeler (AFM)
	VBA for Finance Professionals
CSI	Financial Markets Risk Management Course
	Derivatives Fundamentals and Options Licensing Course
	Canadian Securities Course
Bloomberg	Bloomberg Terminal Certificate

WORK EXPERIENCE

Oct 2013–Present — Product Research Analyst, Invesco

Summary

Analyzing investment funds to understand their construction; identifying attributes of securities within portfolios, what factors managers are exposed to, and what risks are present. Producing actionable analysis for both internal, and external, business partners.

Responsibilities & Accomplishments

- Performed product shelf SWOT analysis for firm and competitors to identify opportunities for product launches, mergers, or corporate actions.
- Built investment fund scorecard to identify best focus list of opportunities for sales team.
- Responded to RFPs under extremely tight deadlines.
- Provided backup trading execution support for PowerShares ETFs.
- Responded to requests from institutional and retail sales channels to position investment funds against, or as a compliment to, competitor funds.
- Provided analysis to sales team directly resulting in 10s of millions in additional sales.

2010–Sept 2013 — Client Relationship Associate, Invesco

Summary

Built relationships with financial advisors and their offices. Learned their business and client needs, and recommended investment solutions. Provided information on investment products, and provided competitive analysis on those products. Discussed individual client accounts and scenarios, and provided: tax information and forms, information on administrative procedures, investment product ideas. Also discussed the broad macroeconomic environment and its relevance to the investment advisor's business and their clients.

SKILLS

Competencies & Traits Analytical mindset, detail-orientation, flexible and willing to listen for other opinions, team player, good communication skills (written and verbal,) strong research ability, critical thinking skills, eager to learn.

Financial Software Bloomberg, Excel, VBA, eVestment, Factset, Morningstar Direct, StyleResearch