ALEXANDER MCGINN

CONTACT INFORMATION

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SUMMARY

5+ years of financial industry experience. Candidate in CFA and CAIA programs. Strong knowledge of Canadian investment funds landscape and industry trends. Strong knowledge of financial software and databases.

WORK EXPERIENCE

Oct 2013–Present Product Research Analyst, Invesco

Summary

Providing product support and communications to clients, providing research and analysis on competitors and industry trends, ensuring the integrity of existing products through a rigorous oversight process, and researching and launching new products.

Responsibilities

- Preparing, maintaining, and interpreting portfolio attribution reports.
- Developing and maintaining peer group reports comparing products to competitors by qualitative and quantitative factors.
- Identifying opportunities to create sales-oriented competitor comparisons.
- Monitoring trends and identifying opportunities that support retail distribution channels (MFDA, IIROC)
- Preparing/analyzing risk oversight packages that provide a detailed overview of portfolio activity, performance drivers, portfolio characteristics, and risk factor exposures.

Accomplishments

- Provided competitive analysis resulting in several large tickets
- Designed and implemented unique tools used by sales team
- Automated numerous reports thereby increasing their robustness and accuracy, and creating new efficiencies

July–Sept 2013 Product Marketing Intern, Invesco

Summary

Coordinated with multiple partners to promote and maintain product brands. Clearly and effectively communicated to ensure successful execution and timely delivery of projects. Demonstrated attention to detail - noted and corrected document oversights. Provided input and generated ideas to position product brands.

2010–June 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.

EDUCATION

Bachelor of Science, McGill University

Summary Learned critical thinking skills. Studied how cognitive biases inform the decision making process. Learned how to understand technical scientific papers and communicate using a scientific and precise vocabulary.

Neuroscience Undergraduate Society (cofounding member.)

McGill Investment Club.

PROFESSIONAL ACCREDITATIONS

CFA Institute CFA Level II Candidate

CAIA Association CAIA Level II Candidate

CSI Financial Markets Risk Management Course

Derivatives Fundamentals and Options Licensing Course

Canadian Securities Course

IFSE Canadian Investment Funds Course

Bloomberg Bloomberg Terminal Certificate

SKILLS

Competencies Analytical mindset, detail-oriented, flexible and willing to listen for other people's opinions, team player, good communication skills (written and verbal,) strong research ability, strategic and critical thinking skills

Software MS Office Suite (Excel, Word, PowerPoint,) Institutional databases (eVestment, Mercer Insight,) Bloomberg, Factset, Style Research, Morningstar Direct, Zephyr StyleADVISOR

Languages English · Native

French · Intermediate (conversationally proficient)