ALEXANDER MCGINN

CONTACT INFORMATION

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SUMMARY

5+ years 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 ongoing 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

·Preparation, maintenance, and interpretation of portfolio attribution reports.
·Develop and maintain peer group reports comparing products to competitors by qualitative and quantitative factors.
·Identify opportunities to create sales-oriented competitor comparisons.
·Monitor trends and identify opportunities for 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 factor risk exposures.

Accomplishments

·Provided competitive analysis resulting in several large tickets ($4M+)
·Designed and created 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 - noticed 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)