

# Elliot Lee

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## EDUCATION

- Bachelor of Commerce** – Queen’s University – Kingston, ON Expected 2017
- **Academics:** 2015 – 2016 GPA 4.15/4.3, CFA Level I Candidate
  - **Honors:** D.I. McLeods Dean’s List, Queen’s Excellence Scholarship, William Miklas Memorial Award
- Exchange Study Program** – Stockholm School of Economics – Stockholm, Sweden Winter 2016
- Travelled to 8 countries and over 20 different cities over the 5 months abroad
  - **Relevant Coursework:** Accounting Problems in Company Valuation, Asset Allocation, Execution: Running Your Own Company, Introduction to Swedish

## PROFESSIONAL EXPERIENCE

- Investment Banking Analyst** – Firepower Capital – Toronto, ON 2016 – Present
- Performed industry research, company and competitor analysis, and due diligence to determine valuations for small to midsize enterprises for mainly sell-side M&A deals
- Summer Intern** – Scotiabank Global Banking and Markets – Toronto, ON Summer 2016
- Restructured data for the top 10% of the FICC clients, representing 5,000+ legal entities, and presented the business the ability to better build and manage client relationships and generate accurate revenue reports
  - Shadowed a government bond trader and gained an understanding of the role of the fixed income product
  - Worked with the S&P Capital IQ platform, Microsoft Office, Bloomberg on a daily basis when reviewing counterparty structures from both a legal and a market review perspective
- Payments and Cash Management Intern** – HSBC Korea – Seoul, KR Summer 2015
- Presented recommendations with an objective of decreasing a major cost line in the departments P&L by \$150,000 through evaluation of the performance and efficiency of the RMs and their allocation system
  - Prepared, consolidated and read management reports on a monthly basis and confirmed that the actual figures were aligned with the company’s projected figures
- Summer Intern** – Investors Group – Vaughan, ON Summer 2014
- Assisted financial advisors in finding and setting up meetings with business prospects in need of financial planning and insurance services and succeeded in closing 2 accounts over the course of the summer
  - Researched and compiled an excel spreadsheet containing over 1000 small Canadian businesses in the Greater Toronto Area in need of financial service products offered by the Investors Group

## EXTRACURRICULAR ACTIVITIES

- Teaching Assistant** – Queen’s University – Kingston, ON 2016 – Present
- Assisted the professor with grading assignments, exams and running working sessions for the commerce students in Introduction to Mathematical Analysis for Management (Comm 161)
- Co-Chair** – Queen’s Korean Student Association – Kingston, ON 2015 – Present
- Directed an executive team of 10, organizing events such as Frosh Welcoming, Mentor Mentee Program, and other socials to grow and create a greater Korean society at Queen’s University
- Senior Captain** – North Toronto Collegiate Institute Football – Toronto, ON 2011 – 2013
- Completed the season with an overall record of 6-1-0, leading the defensive team of 20 to the city finals
  - Graduated with an average of 94% (honour roll with distinction) while committed to over 15 hour weeks

## ADDITIONAL INFORMATION

- CFA Level I Candidate 2017
- Participant of the Financial Modelling Seminar hosted by The Marquee Group 2015
- GBM Trading Floor Tour hosted by Scotiabank 2015
- Delegate for the Queen’s Conference for Business and Technology 2014
- Proficient with Microsoft Office Suite, S&P Capital IQ, Salesforce, Basic Python
- Other interest include basketball (Portland Trail Blazers fan), technology, Esports, travelling