

# REENA HUNJAN, CFA

## WEALTH MANAGEMENT PROFESSIONAL

### CONTACT INFO:

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### STRENGTHS

Domain Knowledge	● ● ● ●
Communication	● ● ● ●
Research & Analysis	● ● ● ●
Strategic Thinking	● ● ● ●

### SKILLS & LANGUAGES

Agile & Scrum	● ● ● ●
Microsoft Office Suite	● ● ● ●
Javascript	● ● ● ●
CSS	● ● ● ●
HTML	● ● ● ●
Tableau	● ● ● ●

### PERSONAL SUMMARY

I am a story teller, financial literacy advocate, analyst & curious explorer. I believe that our individual actions make a difference and that together we can bring about positive change in the world.

It's easier to manifest good things when you are not stressed about money. That's why I work to provide financial literacy education and tools to empower women to make confident financial decisions



[www.moneyforher.com](http://www.moneyforher.com)

### ABOUT ME

A seasoned wealth management professional passionate about driving strategy through data driven decision-making

### EMPLOYMENT BACKGROUND

*Royal Bank of Canada (2005 - 2016, 2018 - Present)*  
**Senior Manager, Strategic Initiatives**, WM Applied Analytics & Innovation Team  
**Manager, Competitive Research & Analysis**, Wealth Management  
**Senior Consultant**, Global Consulting Services  
**Senior Research Analyst**, Enterprise Research & Analysis

*Investor Economics (2004-2005)*  
**Knowledge Management Consultant**

*Franklin Templeton Investments (2002-2004)*  
**Marketing Research Analyst**, Marketing

*TD Canada Trust (1998 - 2002)*  
**Compensation Analyst**, TD Financial Planning  
**Asset Accumulator Specialist**, TD Asset Management  
**Investment Representative, Assistant**, TD Asset Management  
**Investment Representative**, TD Asset Management

### EDUCATION & PROFESSIONAL DEVELOPMENT

<b>Certified Scrum Product Owner (CSPO)</b> , Scrum Alliance	2021
<b>Certified ScrumMaster (CSM)</b> , Scrum Alliance	2020

<b>BrainStation</b> , Toronto, Ontario	
- User Experience (UX) Design	2017
- Product Management	2017
- Web Development	2017

<b>York University</b> , Toronto, Ontario	
- Fixed Income Securities & Risk Management	2007
- Advanced Portfolio Management	2006
- Corporate Finance	2001

<b>University of Toronto</b> , Toronto, Ontario	
- Writing for Children	2005
- Managing Marketing as Competitive Intelligence Certificate	2005

<b>Chartered Financial Analyst (CFA) Designation</b> , CFA Institute	2007
<b>Bachelor of Arts, Economics</b> , McGill University, Quebec	1998

June 24, 2021

Dear Hiring Manager,

I am writing in regards to the role of Associate Director, Data Strategy - Research and Innovation. I believe my extensive experience in research, analysis, developing insights and consulting make me a strong candidate for this role.

Currently I act as Senior Manager, Strategic Initiatives, for the Wealth Management Applied Analytics & Innovation team. My role includes acting as an Agile Project Manager supporting various groups within the team (Reporting & Visualization, Data Engineering, Data Science and Web Development) as they build analytical tools for the Portfolio Advisory Group (PAG). I aid in the development of the strategic direction of digital investment management tools for PAG, create reports and presentations for senior management highlighting key insights and progress, and liaise with various teams within wealth management to understand the strategic direction of wealth management digital applications in order to drive team priorities.

My years in research have provided the skills to comb through multiple sources of information for insights and competitive intelligence in order to prepare reports, research papers, presentations and other forms of communication to support the RBC enterprise in building a differentiated data strategy. I am comfortable developing partnerships across the bank, and engaging with and presenting to senior management and executives. My technical skills allow me to leverage various tools and applications to analyze and develop insights from data.

I am currently pursuing the Financial Data Professional designation from the FDP Institute, which provides a strong background in statistical methodologies to derive insights from data, and knowledge about Big Data and Machine Learning use cases within the financial industry.

I am extremely interested in this role and feel my experience and education would enable me to make a significant contribution to your team. I welcome the opportunity to speak with you further about this opportunity.

Thank you for your consideration.

Sincerely,

Reena Hunjan, CFA