

Brandon Lo

74 Guildford Circle
Markham, ON, Canada, L3R 0R9
Phone: (226) 220-4808 | **Email:** brandon.lo@uwaterloo.ca

EDUCATION

University of Waterloo

Bachelor of Accounting and Financial Management (Honours, Co-op)

Waterloo, ON

Expected January 2015

- **GPA:** 3.8 / 4.0
- **Honors:** University of Waterloo Accounting Conference case competition winner, Dean's Honor List
- **Relevant Courses:** - Corporate Finance (Level I: 91%, Level II: 93%)
- Intermediate Financial Accounting (Level I: 83%, Level II: 94%)

CFA Society – level 1 candidate (wrote December 2013)

Toronto, ON

PROFESSIONAL EXPERIENCE

Analyst, M&A Transaction Services

Deloitte

Toronto, ON

Sep 2013 – Present

- Performed financial due diligence, target screening, and industry analysis to support client acquisitions
- \$3.5 million acquisition of a transportation company
 - Analyzed over 3000 companies using Capital IQ, ultimately proposing a list of 50 strong target companies based on the needs of the client
 - Prepared company profile presentation material used for sales
- \$1.2 million acquisition of an aerospace engineering company
 - Analyzed financial statements and concluded EBITDA was sustainable; resulted in client proceeding with acquisition
 - Reviewed data rooms, attended company presentations and prepared data books

Accounting Analyst, Finance

Scotiabank

Toronto, ON

Jan 2012 – Apr 2012

- Analyzed best practices and communicated with upper management to redesign current change management process to maximize efficiency and turnover of requests by 80%
- Managed the administration of over 90 of the Finance team's Change Management process to ensure compliance with SOX and Scotiabank standards
- Led enhancement of process documentation while making recommendations for improvement
- Created performance metrics using Microsoft Excel to observe, measure and analyze the change management process

Peer Leader, School of Accounting and Finance

University of Waterloo

Waterloo, ON

Jan 2013 – Apr 2013

- Developed personal relationships with 14 first year Accounting and Finance students to ensure a sense of community and camaraderie
- Led and organized academic enrichment activities for students, including networking events, resume critique sessions and a case competition
- Encouraged students to take advantage of University resources and become engaged with campus life
- Collaborated and built connections with faculty, alumni, and other upper-year students in creating value-adding events

ACTIVITIES & INTERESTS

Teaching Assistant, Financial Accounting, University of Waterloo

Jan 2013 – Aug 2013

Student Ambassador, University of Waterloo School of Accounting and Finance

Feb 2011 – Present

General Member, University of Waterloo Strength & Conditioning Club

Apr 2012 – Present

Team Member, Richmond Hill Men's League Slo-Pitch Softball

Apr 2012 – Present