VITHUSHAN ESAN

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PROFILE SUMMARY

Data Scientist with 6+ years of experience in financial services, specializing in data-driven insights and strategies. Proficient in Python, SQL, Excel VBA, and PowerBI, with strong communication and relationship management skills.

EDUCATION

Masters in Management Analytics (MMA) Jan 2024 – Dec 2024
Queen's University, Kingston ON
- Coursework: Predictive Analytics, Big Data Analytics, Machine Learning/AI, Analytics for Financial Markets

Honors of Bachelors in Business Administration (HBBA) Sept 2015 – Aug 2019
Wilfrid Laurier University, Waterloo ON
- Specialization in Accounting and Minor in Economics

Canadian Securities Institute
- Derivatives Fundamentals and Options Licensing Course (DFOL) Dec 2019
- Conduct and Practice Handbook Course (CPH) Nov 2019
- Canadian Securities Course (CSC) Oct 2019

PROFESSIONAL EXPERIENCE

***Associate, Brokerage Operations*- Morgan Stanley Wealth Canada (MSWC)** Aug 2023 - Present
Toronto, ON
- Supports the strategic execution of operational initiatives for the launch of Morgan Stanley Wealth Canada
- Utilizes SQL for data aggregation and transformation to report monthly AUM and flag high-risk accounts
- Built an email automation tool using Excel VBA to curate pre-formatted emails, improving operational efficiency
- Developed an Excel model that reduced wire processing time by 90%, significantly enhancing operational efficiency

***Client Associate, Ultra High Net Worth* – Scotiabank** Jul 2022 – March 2023
Toronto, ON
- Managed 400+ UHNW client relationships, driving business growth through expert trading and sales support
- Executed trades on high volume option spreads and assisted in portfolio rebalancing for high-net-worth clients
- Grew book of business by identifying cross-selling opportunities and coordinating client events for new referrals

***Investment Associate, High Net Worth* – Scotiabank** Jun 2021 - Jul 2022
Toronto, ON
- Served as the primary point of contact for high-net-worth clients and traders, assisting their service and trading needs
- Executed unsolicited trades on stocks, options, bonds, GICs, mutual funds, and precious metals with high accuracy
- Proactively cultivated long-lasting relationships and developed a sales pipeline to drive cross-selling opportunities

***Financial Planning Associate* - TD Wealth Financial Planning** Apr 2020 - Dec 2020
Toronto, ON
- Provided support to two top financial planners managing $200 million portfolios each
- Executed unsolicited trades on a variety of conservative investment products including bonds, mutual funds and GICs
- Assisted in developing financial plans by assessing client risk tolerance, investment objectives, and time horizon

Investment Specialist – BMO Investorline Apr 2020 - Dec 2020
Mississauga, ON
- CIRO licensed investment representative responsible for assisting mass affluent clients with trading and service needs
- Exceeded sales targets, adding $13 million in assets over two quarters, while fostering a collaborative team culture
- Delivered strong customer service with perfect survey scores, communicating portfolio and risk insights effectively