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**Lauric Bakomito**, **CPA, CA**

Fully bilingual (English & French) Financial Analyst with FinTech certificate from the University of Toronto (4.0 GPA), CPA, CA designation and 8+ years of experience in financial services. Proven technical and leadership aptitude in data analysis, machine learning, financial modelling, forecasting and IFRS. Extensive prior collaboration with CFOs of listed companies and global clients managing $1tn in investor assets. Highly proficient in SQL, Python, Pandas, and API use. Passionate about obtaining unique, unapparent insights from data to drive decision-making and propel bottom-line growth. Pursuing a Solutions Engineer (Software Sales) opportunity to merge my passions for finance and data analysis, while helping clients solve complex problems.

**SUMMARY OF SKILLS**

|  |  |  |
| --- | --- | --- |
| * SQL. | * Python. | * Pandas. |
| * Financial Analysis. | * IFRS & US GAAP. | * Financial modeling. |
| * APIs. | * LSTMs/RNNs. | * Website design/Streamlit. |
| * Strong presentation & report-writing skills. | * Advanced Bloomberg, CapitalIQ, Eikon user. | * Project management. |

**PROFESSIONAL EXPERIENCE**

**ORIENTAL EQUIPMENT, TORONTO Mar 2020-Present**

**Financial Manager**

* Works for major Barrick Gold contractor; prepares full monthly management accounts and year-end financial statements; prepares management presentations for prospective clients using PowerPoint.
* Prepares annual operating budgets and capital budgets for new projects using NPV analysis, reports on key financial statement variances with budget and prior year periods.
* Provides recommendations for reducing operating costs and increasing profits; **manages and coaches 6 team members** (including 2 financial analysts, 1 accountant**)**; successfully launched automated accounting software and **reduced month-end reporting time to 4 days**.
* **Holds record of obtaining US $2M in new** (PPE and working capital) **debt funding** for the company and **securing USD $3M p.a. in new revenue** (through infrastructure contracts) for the company.

**TD SECURITIES, TORONTO, ON Jul 2018 –Feb 2020**

**Equity Research Associate *(Contract)* Jul 2019 –Feb 2020**

**Intermediate Financial Analyst *(Contract)* Jul2018- Jul 2019**

* Prepared equity research reports and marketing materials for 8 listed Canadian companies in the Automotive Parts and Consumer Discretionary sectors; built equity valuation and financial forecast models for stocks under coverage.
* Presented to Equity Research, Equity Sales, and external clients (major asset managers).
* **Advised clients managing over US $1TN in investor assets**; delivered accurate, insightful reports in a fast-paced, time-sensitive sector; equity research reports and earnings estimates were **published** on **Bloomberg**.
* Mastered the use of Bloomberg, Capital IQ, Eikon, Microsoft Office PowerPoint and Microsoft Excel (including VBA); responded successfully to bespoke client requests, thus improving my supervisor’s standing with the investor community.
* Reconciled over the counter (‘OTC’) derivative trades to General Ledger; reconciled global FX and Precious Metal trades from source system (Murex) to general ledger(Hyperion).
* Prepared regulatory reports for the SEC, Bank of England, and Statistics Canada.

**DBRS LIMITED, TORONTO, ON**

**Credit Analyst Nov 2017 – Mar 2018**

* Appraised creditworthiness of bond issuers in Mining, Forestry & Construction sectors; built financial forecast models to determine default risk of bond issuers.
* Prepared rating reports and press releases (published on Bloomberg).
* Provided accurate and concise documentation to support ratings and reports; interpreted information to determine the quality and relevance of information to be used for decision making.

**VET STRATEGY INC., GTA, ON Feb 2017-Oct 2017**

**Senior Finance Analyst**

* Prepared financial statements for (private equity firm) stakeholders of a **group of 60+ clinics** (**C$200M** annual revenue) in 7 Canadian provinces; assessed veterinary clinic performance vs. budget for those 60+ clinics.
* Prepared financial forecasts for recently acquired chain of clinics in Québec.
* Monitored covenants with external lenders; introduced a new BI tool (Tableau) that helped management monitor and beat their KPIs.
* **Reduced annual budget lead time by 33%**; monitored budget implementation as well as expenditures and recommended reallocation of funds, as necessary.
* Monitored extra-budgetary resources, managed competing priorities in a rapidly changing environment, including review of agreements and cost plans, ensuring compliance with regulations and rules as well as established policies and procedures.

**BANK OF AMERICA, CAPE TOWN, SOUTH AFRICA Apr 2015 –Dec 2016**

**Equity Research Analyst**

* Advised US, European and South African fund managers **with over USD $1TN in investor assets**; marketed to clients and presented in team meetings.
* Prepared research reports with Buy, Hold and Sell recommendations; built accurate financial forecast and valuation models; **covered 5 Merger & Acquisition deals, 1 divestiture**.
* **Ensured that team was consistently placed in the Top 3 for EEMEA Consumer Sector** research in the Institutional Investor survey (2016, 2017).
* Participated as joint book-runner in **South Africa’s largest IPO (Dis-Chem Pharmacies, 2016, USD $1.2BN)**; drafted research reports including alerts, company updates, industry notes, and initiations.

**INVESTEC BANK, CAPE TOWN, SOUTH AFRICA Jan 2011 - Apr 2015**

**Equity Research Associate Aug 2013 – Apr 2015**

**Trainee Chartered Accountant Jan 2011- Aug 2013**

* Routinely interacted with senior management and marketed to clients, while leveraging understanding of corporate finance and accounting concepts.
* Prepared reports with recommendations for distribution to asset managers and stock traders.
* Developed complex financial forecast and valuation models for food, beverage, and packaging companies.
* Rotated to 5 divisions across the bank between 2011 and 2013 and qualified as a Chartered Accountant upon completing the 3-year training program.

**EDUCATION & PROFESSIONAL DEVELOPMENT**

**FinTech Bootcamp – University of Toronto** *(4.0 GPA)* ***2022***

**CFA Level I** *(Passed on first attempt)* **2017**

**CPA, CA – Chartered Professional Accountants of Ontario 2017**

**CA (SA) – South African Institute of Chartered Accountants 2014**

**Postgraduate Diploma, Accounting – University of Cape Town 2010**

**Honours, Bachelor of Business Science – University of Cape Town 2009**

* Accredited by World Education Services (WES) Canada
* Undergraduate Major in Finance & Accounting, First Class Honours for Finance Thesis.