

Eric H. Yoo

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EDUCATION

Lazaridis School of Business and Economics, Wilfrid Laurier University

Bachelor of Arts in Economics

Specialization in Financial Management

Waterloo, ON

2014 – 2018

CFA Institute

CFA Level III Candidate

Charlottesville, VA

May 2021

Qualifications

- IBM Data Science Professional Certificate 2020
- Derivatives Fundamentals and Options Licensing 2019
- Canadian Securities Course I & II 2018
- The Conduct and Practices Handbook Course 2018
- Bloomberg Analytics Certification 2017
- *Breaking into Wall Street Premium: Advanced Financial Modeling and Excellence with Excel* 2017

PROFESSIONAL EXPERIENCES

Raymond James

Portfolio Analyst

June 2020 – August 2020

London, ON

- Directly assisted in managing \$350M+ AUM by providing research-backed trade and rebalancing recommendations to lead portfolio managers
- Analyzed macroeconomic developments and trends in order to generate informed investment decisions
- Maintained large databases of all AUM and utilized VBA macros and Index & Match functions to automate the database updating procedure—resulting in increased efficiency of 300%+
- Monitored and resolved daily credit and debit balances in a timely manner

TD Waterhouse

Investment Representative

July 2018 – March 2020

London, ON

- Conducted research on stocks, ETFs, mutual funds, derivatives, and fixed income products to ensure clients are making informed decisions
- Proactively gathered assets by probing existing and new clients—executed transfers in amounts of \$2M+ from major institutions such as Fidelity, BMO, and RBC
- Surpassed all departmental objectives such as sales revenue, the Legendary Experience Index, and compliance, while maintaining 130%+ overall efficiency
- Organized and directed team meetings by setting team goals, delegating tasks, and setting deadlines to encourage high performance

LEADERSHIP EXPERIENCES

TD ID8 Committee

Committee Member

2019

TD Waterhouse

- Met weekly to discuss and review ID8 database of ideas for potential solutions to improve productivity on brokerage functions and processes
- Conducted cost benefit analysis to evaluate the viability of projects and presented findings to committee and department

Laurier International Business

Vice President of Events

Fall/Winter 2018

Wilfrid Laurier University

- Completed a \$2000 comprehensive annual budgeting plan with the use of Microsoft Excel
- Secured *Microsoft* as a corporate sponsor to launch an inaugural tri-campus case competition for over 100+ students resulting in a participation growth rate of over 300%

ADDITIONAL INFORMATION

Interests: Competitive Breakdance, Chess, Guitar, Toronto Raptors, Golf, Bodybuilding