

RISHABH MATHUR

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EDUCATION

Bachelor of Arts, University of British Columbia (3.75 CGPA)

Major in Economics and Statistics, Minor in Data Sciences (**PASSED CFA LEVEL 1, 90th Percentile +**)

Expected Completion Date - Apr 2026

- **Technical Skillset** - Underwriting, MS Office, Power BI, SQL, SharePoint, Gen AI, Python, R-Studio, Modelling, Communication
- **CIBC Exceptional Student Program Candidate** - Program for students who received exceptional reviews from their Hiring Manager.

WORK EXPERIENCE

Summer Analyst - Internal Audit (Wealth & Data Analytics), CIBC, Toronto, ON

May 2025 - Aug 2025

- Evaluated **20+ insurance** and investment products by **documenting control procedures**, performing a **SWOT analysis**, and testing control gaps; utilized MS Office and PowerBI to test controls and recommend innovative enhancement opportunities to management.
- Mitigated SOX-sensitive data risk by testing application access for **1,200+ employees** and identified residual access issues; issued a medium-rated deficiency and applied **advanced VBA and Power BI** to streamline analysis and present findings.
- Designed 5-10 page GenAI prompts and created Power BI dashboards to simplify audit deficiency and summary writeups, generating **300+ annual hours** in efficiency gains and **demonstrating initiative, data-driven analysis, and effective collaboration** across audit teams.

Fall Analyst - Private Banking, Scotia Wealth Management, Vancouver, BC

Sep 2024 - Dec 2024

- Supported Private Bankers' underwriting by processing **1,000+ financial transactions** and turning **client financial statements into decision-ready credit briefs**, evaluating cash flows, loan covenants, and repayment capacity to inform onboarding and lending decisions and **flag potential risk indicators**.
- Reviewed KYC/AML templates submitted by Private Bankers on Salesforce, **identified missing or inconsistent information**, and followed up via email or phone to resolve gaps, ensuring accuracy in compliance processes and client communication.

Winter Analyst - Tax Administration, Scotia Wealth Management, Vancouver, BC

Jan 2024 - Apr 2024

- Prepared **90+ high-net-worth client tax returns** by reconciling slips and statements across years, verifying source data, and resolving discrepancies, strengthening my **attention to detail, regulatory awareness**, and ability to work with **sensitive financial information**.
- Modified an Excel script to **automate tax-fee calculations and map imports**, thereby streamlining workflow, reducing manual entry, and demonstrating **problem-solving and initiative** in improving efficiency.

Summer Analyst, Credit Suisse, Dubai, UAE

Jul 2022 - Aug 2022

- **Conducted** market research and supported the development of **investment strategies** by analyzing financial metrics, leveraging Bloomberg and CapIQ, and applying VBA to datasets, enhancing ability in **valuation and cash flow analysis**.
- Delivered client simulations and stock pitches to test market assumptions and portfolio decisions, **strengthening analytical judgment, communication**, and ability to translate research into **strategic solutions**.

CASE COMPETITIONS

National Investment Banking Competition

Oct 2023 - Jan 2024

- Analyzed financial data and conducted valuations by utilizing skills in **financial modeling and market research** to create a strategic business plan. This included conducting a **Discounted Cash Flow Analysis, Comps Analysis - Precedent Analysis**, and creating a Pitchbook on Diageo.

NwPlus Hackathon

Nov 2023

- Developed a student-focused budgeting website in 12 hours, leveraging **Python, Figma Mastery, React, and HTML**; applied expense calculations with personalized recommendations and utilized assigned weights for optimal adjustments.

UBC Environmental Policy Association X Student Energy Association Case Competition

Nov 2023

- Secured 1st place by leading a feasibility study on sustainable energy avenues for a country, forecasting long-term cash flows in Excel, and presenting strategic recommendations that balanced financial performance with operational and environmental considerations.

LEADERSHIP & INVOLVEMENT

Resident Advisor, University of British Columbia

Aug 2022 - May 2023

- Supported 100+ first-year students by building relationships and leading community events, drastically **improving my communication, relationship management skills**, and ability to foster client engagement through proactive support.

Events Director, UBC Economics Student Association

Aug 2022 - May 2023

- Planned and executed 5+ events for undergraduate to PhD students and represented the association at 10+ conferences, strengthening **networking, business development, and team-building skills** while delivering sessions on finance and portfolio management.