

SEBASTIAN GARNIER LAZARIN

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Professional Summary

Finance and data professional with 4+ years of experience in investment operations, compliance, and analytics. Skilled in transforming complex financial data into actionable insights for executives and clients. Strong academic foundation in Economics (Finance specialization) and Environmental Studies, with expertise in financial modeling, reporting, and ESG-focused analysis. Advanced in Excel, Power BI, and presentation tools; working knowledge of SQL, HTML, and data visualization. Fluent in English, Spanish, and French (B2+). Currently pursuing CFA Level I with a long-term goal of combining finance, sustainability, and technology to drive meaningful impact.

Professional Experience

Investment Administrator & Dealing Representative — Fisgard Asset Management (Victoria, BC) | Jun 2023 – Present

- Reduced investment filing process time by 33% through advanced Excel automation (macros, pivot tables, VLOOKUP), helping the firm achieve faster compliance turnaround.
- Created and delivered monthly and quarterly presentations to executives, translating complex data into clear insights that influenced decision-making.
- Reconciled and managed over 500+ retirement accounts bi-weekly, ensuring accuracy in tax reporting, compliance, and timely processing of payments.
- Oversee documentation and compliance for 200+ client portfolios, contributing to a 90% client retention rate annually.
- Led operational improvements by collaborating with the Chief Compliance Officer to execute a major system migration, training staff across administration, dealing representatives, and executives.
- Identified inefficiencies in existing workflows and proposed solutions that improved reporting accuracy and saved hours in recurring tasks.
- Balanced regulatory responsibilities with client-facing advisory duties, developing a strong hybrid skillset in compliance, operations, and relationship management.

Bank Teller — TD Canada Trust (Victoria, BC) | Jul 2021 – Jun 2023

- Managed daily cash operations and branch inventories of up to \$500K.
- Consulted with clients to identify financial needs and recommend solutions.
- Maintained 100% compliance with operational and security standards.

Education & Certifications

University of Victoria — Bachelor's Degree in Economics (Finance Specialization) & Bachelor's Degree in Environmental Studies, 2022

Google Data Analytics Certificate (Coursera, 2023)

Exempt Market Proficiency Course (IFSE, 2023)

CFA Level 1 Candidate (CFA Institute, 2026)

Technical & Professional Skills

Analytics & Tools	Excel (advanced automation), PowerPoint (advanced), Word (advanced)
Data & Visualization	Power BI (intermediate), SQL (beginner), HTML (intermediate), Data Analysis (intermediate)
Finance & Operations	Financial statement analysis, compliance reporting, portfolio administration, investments
Languages	Spanish (native), English (native), French (professional B2)

References

Available upon request