SEBASTIAN GARNIER LAZARIN

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Professional Summary

Finance professional with 4+ years of experience in investment operations and compliance, contributing to firm wide process enhancements and system transitions. Proficient in Excel, PowerPoint, Power BI, and SQL, and actively pursuing further education to deepen financial and technical expertise. Fluent in three languages, with a strong interest in finance, technology, the environment, and global strategy. Long-term goal: to grow within a supportive environment, collaborate with driven teams, and contribute to ventures that make a meaningful impact.

Professional Experience

Investment Administrator & Dealing Representative
Fisgard Asset Management – Victoria, BC | Jun 2023 – Present
- Streamlined the company's securities filing process, reducing filing time by 33% through advanced Excel automation. Used Excel Macros and VLOOKUP functions to enhance efficiency and accuracy.
- Prepare and deliver PowerPoint presentations to executives on a monthly and quarterly basis, summarizing key financial data and reconciliation results.
- Manage and reconcile over 500 RRIF accounts on a bi-weekly basis, ensuring tax accuracy and compliance with regulatory standards, similar to high-volume accounting processes.
- Support over 200 client investment portfolios by providing documentation, compliance oversight, and advisory support. Achieved a 90% client retention rate and contributed to a 25% increase in personal portfolio value.
- Collaborate directly with the Chief Compliance Officer to lead the transition from an internal system to an external platform. Coordinate efforts across administration, dealing representatives, and executive leadership to ensure successful implementation.

Bank Teller
TD Canada Trust – Victoria, BC | Jul 2021 – Jun 2023
- Managed cash inventories and forecasted weekly cash needs for branch ATM
- Engaged in consultative conversations to identify costumer needs

Education

B.A. in Economics (Finance Specialization) & B.A. in Environmental Studies
University of Victoria, 2022
Certifications: Google Data Analytics Certificate (*Coursera, 2023*), Exempt Market Proficiency Course (*IFSE, 2023*), CFA Level 1 Candidate (*CFA Institute, TBC*)

Languages

Languages: English (native), Spanish (native), French (B2+ , advanced)

References

- Available upon request