



Tyler Bustard

Finance & Technology Professional

Driving innovation at the intersection of finance and technology. Delivering exceptional results through analytical expertise, strategic thinking, and client-focused solutions.

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Education



Bachelor of Business Administration - Finance Major

2020

University of New Brunswick

Saint John, New Brunswick

- Case Competitions: 1st Place (CIBC), 3rd Place (TD), RBC and SLC participant
- Analyst and Portfolio Manager – University of New Brunswick Student Investment Fund
- UNB Finance Club, RBC Student Ambassador, Accredited Co-op Program
- Recipient of 5 Scholarship and Alumni Awards for academic merit and leadership skills, Total \$47,500

Professional Experience



Portfolio Assistant

2022 - 2023

[BMO Private Wealth](#)

Toronto, Ontario

- Advised two Investment Counsellors managing portfolios over \$100M and cut preparation time by 12%
- Bolstered client communications, boosting response rates by 9% heightening client satisfaction and retention

Portfolio Management

Client Relations

Financial Analysis

Excel



Financial Advisor

2021 - 2022

[TD Canada Trust](#)

Kingston, Ontario

- Cultivated strong client relationships by assessing individual financial needs, resulting in an 11% increase in sales
- Exceeded sales targets, achieving a top 15% performance ranking within the district

Financial Planning

Sales

Client Advisory

Product Knowledge



Banking Advisor

2020 - 2021

[Royal Bank of Canada](#)

Kingston, Ontario

- Strengthened client relationships by advising on personalized solutions, increased repeat transactions by 13%
- Excelled in needs-based advising, boosting adoption of core products like GICs, mutual funds, and TFSAs by 8%

Banking Products

Financial Advisory

Client Relationship Management

Digital Banking

Professional Experience (continued)



Client Advisor Intern

2019 - 2020

[Royal Bank of Canada](#)

Fredericton, New Brunswick

- Resolved complex client issues, achieving a 15% boost in positive feedback scores for the branch
- Promoted RBC's digital banking tools, leading to a 10% increase in online and mobile banking adoption

Client Service

Digital Banking

Problem Resolution

Customer Support



Marketing Intern

2018

[Irving Oil Limited](#)

Saint John, New Brunswick

- Conducted competitor analysis driving insights that improved targeted marketing by 11%
- Developed a Customer Lifecycle model that increased targeted promotions, boosting customer engagement by 8%

Market Research

Customer Analytics

Competitive Analysis

Marketing Strategy



Tax Return Intern

2018

[Grant Thornton LLP](#)

Saint John, New Brunswick

- Streamlined client financial data, boosting accuracy by 10% ensuring timely submission of 100+ tax returns
- Improved tax return preparation processes, cutting filing errors by 15%

Tax Preparation

Financial Analysis

Data Management

Client Service

Professional Certifications



CFA Level I Candidate

2025

[CFA Institute](#)

Comprehensive training in investment analysis, portfolio management, and ethical standards



Discounted Cash Flow Analysis

2024

[Training the Street](#)

Advanced financial modeling techniques for valuation using discounted cash flow methodology

Community



Next Gen Ambassador

2020 - 2023

[United Way](#)

Kingston, Ontario

- Led implementation of fundraising strategies achieving 20% increase in funds raised over three years
- Spearheaded engagement initiatives resulting in 15% rise in participation and awareness within workplace community

Fundraising Strategy

Leadership

Event Planning

Community Engagement

Stakeholder Management