



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