

# Tyler Bustard

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## EDUCATION

**Smith School of Business, Queens University, Toronto, Ontario**

**Master of Finance Candidate, 2027**

- Case Competitions: CFA Research Challenge, Investment Banking Competition and McGill Portfolio Challenge
- Analyst - Financial sector - Queen's University Alternative Assets Fund (QUAAF)
- Member of Finance Club, Case Competition Union, Investment-Banking and Asset-Management Clubs
- Deans Entrance Scholarship Award, Total \$2,500

**University of New Brunswick (UNB), Saint John, New Brunswick**

**Bachelor of Business Administration, 2020**

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

## PROFESSIONAL EXPERIENCE

**Fiscal.ai, Toronto, Ontario**

**Equity Analyst, 2023 – Present**

- Analyze and compile public company financial statements, cutting reporting turnaround by 13%
- Collaborate with product and engineering to implement AI-driven data features boosting adoption by 12%

**BMO Private Wealth, Toronto, Ontario**

**Portfolio Assistant, 2022 – 2023**

- 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

**TD Canada Trust, Kingston, Ontario**

**Financial Advisor, 2021 – 2022**

- 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

**Royal Bank of Canada, Kingston, Ontario**

**Banking Advisor, 2020 – 2021**

- 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%

**Royal Bank of Canada, Fredericton, New Brunswick**

**Client Advisor Intern, 2019 – 2020**

- 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

**Irving Oil Limited, Saint John, New Brunswick**

**Marketing Intern, September – December 2018**

- 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%

**Grant Thornton LLP, Saint John, New Brunswick**

**Tax Return Intern, January – May 2018**

- 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%

## ADDITIONAL INTERESTS AND SKILLS

- Volunteer, Next Generation Ambassador - United Way (2020 - 2023), Student Ambassador for RBC (2019 – 2020)
- Canadian Securities Institute: Financial Planning 1 (2023), Canadian Securities Course (2021)
- CFA level 1 Candidate (2025), Discounted Cash Flow Analysis and Modeling (2024)