



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 Royal Bank of Canada Fredericton, New Brunswick <ul style="list-style-type: none">Resolved complex client issues, achieving a 15% boost in positive feedback scores for the branchPromoted RBC's digital banking tools, leading to a 10% increase in online and mobile banking adoption <div>Client ServiceDigital BankingProblem ResolutionCustomer Support</div>	2019 - 2020
	Marketing Intern Irving Oil Limited Saint John, New Brunswick <ul style="list-style-type: none">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% <div>Market ResearchCustomer AnalyticsCompetitive AnalysisMarketing Strategy</div>	2018
	Tax Return Intern Grant Thornton LLP Saint John, New Brunswick <ul style="list-style-type: none">Streamlined client financial data, boosting accuracy by 10% ensuring timely submission of 100+ tax returnsImproved tax return preparation processes, cutting filing errors by 15% <div>Tax PreparationFinancial AnalysisData ManagementClient Service</div>	2018

Professional Certifications

	CFA Level I Candidate CFA Institute Comprehensive training in investment analysis, portfolio management, and ethical standards	2025
	Discounted Cash Flow Analysis Training the Street Advanced financial modeling techniques for valuation using discounted cash flow methodology	2024

Community

	Next Gen Ambassador United Way Kingston, Ontario <ul style="list-style-type: none">Led implementation of fundraising strategies achieving 20% increase in funds raised over three yearsSpearheaded engagement initiatives resulting in 15% rise in participation and awareness within workplace community <div>Fundraising StrategyLeadershipEvent PlanningCommunity EngagementStakeholder Management</div>	2020 - 2023
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