

Tyler Bustard

Finance & Technology Professional

Driving innovation at the intersection of finance and technology. Delivering exceptional results through analytical expertise, strategic thinking, and clientfocused 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

- 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 a

Portfolio Management Client Relations Financial Analysis Excel



Financial Advisor

2021 - 2022

TD Canada Trust

- 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

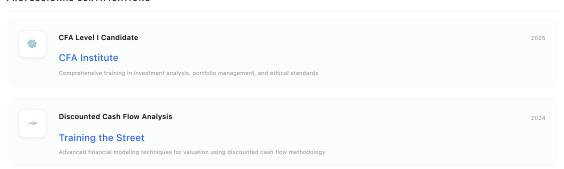
PROFESSIONAL EXPERIENCE (CONTINUED)



Client Advisor Intern

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 0 **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%

PROFESSIONAL CERTIFICATIONS



Tax Preparation Financial Analysis Data Management Client Service

COMMUNITY

