



Tyler Bustard

Finance & Technology Professional

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tylerbustard.ca

Toronto, Ontario

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

EDUCATION

Master of Finance Candidate

Smith School of Business • Queen's University

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

2027

Bachelor of Business Administration

Finance Major • University of New Brunswick

- Analyst and Portfolio Manager - University of New Brunswick Student Investment Fund
- Member of UNB Finance Club, RBC Student Ambassador, Accredited Co-op Program
- Recipient of 5 Scholarship for academic merit and leadership skills, Total \$47,500

2016-2020

PROFESSIONAL EXPERIENCE

Portfolio Assistant

BMO Private Wealth • Toronto, ON

- Advised Investment Counsellors managing \$100M+ AUM, reducing preparation time by 12%
- Bolstered client communications, boosting response rates by 9%, heightening client satisfaction and retention

Portfolio Management

Wealth Management

Client Relations

Financial Modeling

Advanced Excel

2022-2023

Financial Advisor

TD Canada Trust • Kingston, ON

- Cultivated strong client relationships, achieving 11% sales increase through needs-based advisory
- Exceeded targets, achieving top 15% performance ranking within district

Financial Planning

Sales

Investment Advisory

Compliance

CRM

2021-2022

Banking Advisor

Royal Bank of Canada • Kingston, ON

- 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

2020-2021

CO-OP EXPERIENCE

Client Advisor Intern

RBC • Fredericton, NB

2019-2020

Marketing Intern

Irving Oil • Saint John, NB

2018

Tax Return Intern

Grant Thornton LLP • Saint John, NB

2018

PROFESSIONAL CERTIFICATIONS

CFA Level I Candidate

CFA Institute

Investment Analysis & Ethics

2025

GRE Exam

Educational Testing Service

Score: 325 (Q: 165, V: 160)

2024

Financial

10 certifications

Data & Technology

6 certifications

Advanced Analytics

5 certifications

COMMUNITY LEADERSHIP

Next Gen Ambassador

United Way

Led fundraising strategies & engagement initiatives

2020-2023

Student Ambassador

Royal Bank of Canada

Increased student engagement by 25% through campus events

2019-2020