




# Tyler Bustard

## Finance & Technology Professional

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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

2025-2027

- 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
- Dean's Entrance Scholarship Award, Total \$5,000



Bachelor of Business Administration


Major in Finance

University of New Brunswick

2016-2020

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

### PROFESSIONAL EXPERIENCE



Senior Associate, Portfolio Monitoring


73 Strings

Toronto, ON

Nov 2025-Present

- Monitor daily NAV inputs, validate holdings and cash flows; support accurate fund valuations
- Review reconciliation workflows, investigate exceptions, and liaise with operations risk and PMs

Monitoring Controls   Reconciliation   NAV Validation   SQL   Excel



Equity Analyst


Fiscal.ai

Toronto, ON

2023-November 2025

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

Financial Analysis   AI Integration   Data Analytics   Python   SQL



Portfolio Assistant

BMO Private Wealth


Toronto, ON

2022-2023

- 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   Client Relations   Financial Analysis   Excel

### EARLY CAREER EXPERIENCE




Financial Advisor

TD Canada Trust

Kingston, ON

2021-2022




Banking Advisor

Royal Bank of Canada

Kingston, ON

2020-2021

### CO-OP EXPERIENCE




Client Advisor Intern

Royal Bank of Canada

Fredericton, NB

2019-2020




Marketing Intern

Irving Oil Limited

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



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Finance Certifications



6


Technology Certifications



5

Analytics Certifications

### COMMUNITY LEADERSHIP




Next Gen Ambassador

United Way

Toronto, ON

2020-Present




Student Ambassador

Royal Bank of Canada

Fredericton, NB

2019-2020



Volunteer Staff

Irving Oil Limited

Saint John, NB

2018