



# Tyler Bustard

Finance & Technology Professional

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🌐 tylerbustard.net

📍 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

2025-2027

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



### Bachelor of Business Administration

2016-2020

Major in Finance

University of New Brunswick

- 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

Nov 2025-Present

73 Strings

Toronto, ON

- 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

2023-November 2025

Fiscal.ai

Toronto, ON

- 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

2022-2023

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

Client Relations

Financial Analysis

Excel

## EARLY CAREER EXPERIENCE



### Financial Advisor

2021-2022

TD Canada Trust

Kingston, ON



### Banking Advisor

2020-2021

Royal Bank of Canada

Kingston, ON

## CO-OP EXPERIENCE



### Client Advisor Intern

2019-2020

Royal Bank of Canada

Fredericton, NB



### Marketing Intern

2018

Irving Oil Limited

Saint John, NB



### Tax Return Intern

2018

Grant Thornton LLP

Saint John, NB

PROFESSIONAL CERTIFICATIONS



CFA Level I Candidate

CFA Institute

Investment Analysis & Ethics

2025



GRE Exam

Educational Testing Service

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

2024



Finance Certifications

10



Technology Certifications


6



Analytics Certifications

5

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