



# Tyler Bustard

## Finance & Technology Professional

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[tylerbustard.net](http://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



10

### 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