

EDUCATION

Master of Data Science & Mitacs Intern -Toronto Metropolitan University | Toronto, ON- [2025]

Queen's University | Kingston, ON- Bachelor of Science: Honours | Dean's Honour List

DAT EXAM (Dental Aptitude Test) & **CASPER TEST** (Computer-Based Assessment for Sampling Personal Characteristics)

EXPERIENCE

Investment Research Analyst | *Optimize Wealth Management, Toronto, ON* | Dec 2023 – Present

- Conduct in-depth investment research and analysis to support strategic portfolio management decisions.
- Prepare detailed performance reports, track fund performance, and identify key trends to inform investment strategies.
- Perform portfolio reconciliation to ensure accuracy and consistency across all investment data.
- Provide actionable insights and recommendations based on comprehensive market trends and data analysis.

Associate | *Optimize Wealth Management, Toronto, ON* | Dec 2022 – Dec 2023

- Collaborated with Advisors, Portfolio Managers, and Tax and Investment Teams to ensure seamless client service delivery.
- Resolved 100+ daily service requests from financial planners handling portfolios valued between \$50M and \$200M+.
- Provided exceptional customer service by answering calls and addressing client inquiries promptly and accurately.
- Created and processed ticket requests for a variety of transactions, ensuring timely and precise execution of client requests.
- Maintained regular communication with custodians and proficiently utilized CRM tools to track and manage client interactions.
- Achieved additional responsibilities within 100 days, including a managerial position in Will and Estate planning and execution.

Teaching Assistant *Toronto Metropolitan University* | October 2023 – Present

- Assisted in the delivery of content for undergraduate courses, including organizing and conducting lectures and class activities.
- Support students through office hours, emails, and communication channels, including individualized guidance and mentorship.
- Graded assignments, exams, and other assessments promptly, fairly, and accurately, ensuring clear and constructive feedback.
- Facilitated discussion and lab groups to enhance student understanding and engagement with course content, supporting the development and administration of quizzes and exams.

Research Analyst | *Goodself, Toronto, ON* | May 2021 – March 2022

- Created content, conducted research, and executed marketing plans for a health tech app launch.
- Recruited healthcare experts to join the platform and assisted with beta testing to ensure product readiness and user satisfaction.

Foundation Associate | *Scotiabank, Toronto, ON* | May 2020 – Aug 2020

- Provided high-net-worth clients and charitable beneficiaries with personalized service by compiling information for new accounts and preparing opening inventory.
- Monitored cash positions and processed accounting entries promptly and accurately.
- Submitted routine correspondence and documentation for internal oversight to maintain compliance and operational efficiency.

Sales Manager | *Leadup Consulting, Toronto, ON* | May 2019 – Aug 2019

- Led and trained a team on credit card knowledge and effective sales techniques, achieving high performance and sales targets.
- Promoted to team lead for record sales, and was responsible for coaching, mentoring, and training team members while developing and implementing new sales strategies to drive growth and success.

Volunteering

Research Volunteer | *Institute of Public Health, Tirana, Albania* – Part of public health risk department- Analyzed raw data on the prevalence of sleep disorders, as a direct result of noise levels and assessed sleep disturbance through pre-structured interviews.

Mentor for Students | *PennyDrops, Queens University* - Prepared & presented talks about financial literacy for high school students.

Sponsorship Director | *Trek for Teens, Queens University* - Proactively contacted businesses for sponsorship items for events intended to raise funds and awareness for at-risk and homeless youth in the Kingston Community.

Skills

Python, Data Analysis, Research, Investment Management, Portfolio Management, Customer Service, Client Relationship, Written and Verbal Communication, Report Generation, Social Media, Compass, Hubspot, Financial Reporting, Investment Funds, Record Keeping