

# Benjamin Legeard

## EDUCATION

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### Rotman School of Management & Department of Economics, University of Toronto

*Master of Financial Economics*

Toronto, Ontario

*Expected June 2026*

- **Scholarship:** Graduate Entrance Scholarship (\$6,000)
- **Relevant Courses:** Corporate Financing II; Securities & Portfolio Analysis; Business Analysis and Valuation

### Gordon S. Lang School of Business and Economics, University of Guelph

*Bachelor of Commerce, Major in Management Economics and Finance, Specialization in Finance*

Guelph, Ontario

*Sep 2019 – Apr 2024*

- **Academics:** GPA 3.94/4.0
- **Scholarships:** Board of Governors' Entrance Scholarship (\$20,000); John Kenneth Galbraith Scholarship (GPA – Economics); Wilson Family Scholarship (GPA – Investments); Jenkinson M&A Scholarship (GPA – Mergers & Acquisitions)
- **Relevant Courses:** Corporate Finance (A+); Investments (A+); Financial Accounting – I, II, & III (A+); Security Analysis (A+)

## INDUSTRY CERTIFICATIONS

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- Corporate Finance Institute – 3-Statement Modelling, Financial Analysis, Accounting *Winter 2024*
- Bloomberg Market Concepts – Equities, Fixed Income, Foreign Exchange, Economic Indicators *Winter 2021*

## PROFESSIONAL EXPERIENCE

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### Wells Fargo – Commercial Underwriting

*Underwriting Analyst*

Mississauga, Ontario

*Winter & Summer 2023*

- Evaluated exposures of \$5mm+ USD in developing recommendations and supporting analysis for portfolio rebalancing
- Forecasted earnings and cash flows based on historical financials, consumer demographics, and macroeconomic sensitivities to develop an understanding of key drivers for NTM performance
- Read 1000+ pages of supporting materials including audited financials, origination documents, and restructuring agreements to develop insights into the risk profile and performance of the assets
- Engaged management about perceived inconsistencies or incomplete information in their commentary and financial statements to ensure decisions were based on the most accurate and complete information attainable

### Ryan, LLC – Project Finance

*Funding Analyst*

Guelph, Ontario

*Summer 2022*

- Engaged clients such as Nestlé in preparing federal funding applications, securing over \$40mm in grants and subsidized financing
- Conducted due diligence on programs relating to onshoring, renewable energy, and workforce expansions to identify objectives and funding capacities before structuring applications on this basis
- Projected out 5-10 years of financial and operating results connecting back to program objectives and ancillary benefits (e.g., tax revenues and exports)
- Communicated with government contacts to identify upcoming initiatives relevant to the existing and prospective client network

### Canada Revenue Agency – Excise Tax

*Excise Tax Auditor / Examiner*

Toronto, Ontario

*Summer & Fall 2021*

- Examined financial data, contracts, and timelines relating to the sale of residential real estate
- Documented 120+ hours of research per transactions to support final assessments
- Received acceptances for all 8 draft proposals sent to senior auditors – representing \$50mm in taxable sales

## RELEVANT ACADEMIC PROJECTS

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### FIN4900 – Security and Portfolio Analysis

*Equity Research*

Guelph, Ontario

*Winter 2024*

- Studied Microsoft and Fairfax Financial over six weeks through regulatory filings, industry publications, and relevant economic data
- Developed key drivers for both companies, comparing their performances over time and identifying the catalysts for value realization
- Prepared a 20+ page report and 30+ slide PowerPoint detailing the economics, management, and prospects of each business

## EXTRACURRICULAR ACTIVITIES

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### Learning Disabilities Association of Wellington-County

*Linguistics Tutor*

Guelph, Ontario

*Fall 2021*

## PERSONAL

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- **Technical skills:** Familiar with Excel, PowerPoint, Bloomberg Terminal
- **Interests:** Bonsai Gardens, Martial Arts (12 years), Architecture, Weightlifting, Exotic Coffees