

Timothy Shepherd

EDUCATION

Rotman School of Management & Department of Economics, University of Toronto Toronto, Ontario
Master of Financial Economics 2022 – Present

- **Award:** Graduate Entrance Scholarship (\$6,000)
- **Upcoming Courses:** Corporate Financing II, Options and Futures, Financial Economics I, Econometrics

Lazaridis School of Business and Economics, Wilfrid Laurier University Waterloo, Ontario
Honours Bachelor of Arts, Economics and Financial Management (Co-op Option) 2018 – Present

- **Academics:** cGPA 3.86/4.00
- **Awards:** Dean's Honour Roll, In-Course Scholarship (\$1,500)
- **Relevant Courses:** Adv. Equity Analysis (A+), Financial Management II (A+), Adv. Macroeconomics (A+), Int. Accounting I (A+)

INDUSTRY CERTIFICATIONS

- The Marquee Group – Financial Accounting, DCF Valuation, and Merger Modelling 2022
- Bloomberg Analytics Certification 2019

PROFESSIONAL EXPERIENCE

Framework Venture Partners Toronto, Ontario
Venture Capital Junior Analyst Sep – Dec 2021

- Interviewed 180+ technology start-up CEOs to source deals; brought forward 27 investment opportunities for team consideration
- Conducted initial due diligence screening on three start-ups by examining unit economics, business model, and financial performance
- Assisted in organizing the annual Canadian AI Summit, a conference exploring AI's impact across various industries
- Selected Deal Experience:
 - Undisclosed (Secondary): Created due diligence memo, conducted MOIC and return sensitivity analysis
 - MaxSold (Series B): Calculated top-down TAM and potential revenue from ARPU expansion opportunities
 - Hypatos (Series A): Researched competitor product offerings and created analysis grid comparing technology features

Office of the Superintendent of Financial Institutions Toronto, Ontario
Financial Risk Analyst – Market & Liquidity Risk Division Jan – Apr 2021

- Analyzed Canadian banks' stock of liquid assets in relation to cash flow needs to gauge survivability in stressed scenarios
- Researched volatility of yield spreads, bank share prices, market indices, and FX rates to identify early warning indicators
- Examined value at risk across various trading desks including equities, fixed income, commodities, and FX

Federal Economic Development Agency for Southern Ontario Waterloo, Ontario
Business Analyst May – Sep 2020

- Assessed loan applications for a \$2 billion stimulus package supporting businesses negatively affected by Covid-19
- Recommended over \$3.6 million worth of federally funded loans and contributions to struggling companies
- Analyzed financial statements and financial ratios to evaluate credit risk, capital structure, and past performance

EXTRACURRICULAR ACTIVITIES

Laurier Student Investment Fund Waterloo, Ontario
Equity Analyst Jan – Apr 2022

- Analyzed a technology company for a \$1.2 million student-run investment fund and pitched buy recommendation to faculty advisors
- Supported investment thesis by performing DCF analysis and relative valuation; concluded company was undervalued

Laurier Start-up Fund Waterloo, Ontario
Venture Analyst Jan – Apr 2022

- Performed high-level due diligence on 80+ start-ups for Graphite IV, a \$100 million seed fund by Graphite Ventures
- Created Excel database with information from analysis; pitched top two start-ups to investment committee for further examination

Laurier Economics Club Waterloo, Ontario
Director of Economic Research Apr 2021 – Apr 2022

- Hired, trained, and supervised a team of volunteer researchers to help publish economic articles on a variety of topics
- Wrote case study/literature review analyzing profitability of mergers and acquisitions

PERSONAL

- **Technical Skills:** Experienced in Capital IQ, Excel, PowerPoint, and Stata; Familiar with Bloomberg and SQL (beginner)
- **Interests:** Backpacking in the Adirondack Mountains, entrepreneurship (owned a window cleaning business in first year of university and achieved \$30,000 in revenue), full-time Liverpool F.C. fan