

Zachary Shafi

EDUCATION

Rotman School of Management and Department of Economics, University of Toronto

Toronto, Ontario

Master of Financial Economics

Jul 2023 – Dec 2024

– **Awards:** Entrance Scholarship (\$3,000)

– **Relevant Courses:** Corporate Financing II (MBA), Econometrics (MA), Microeconomics (MA), Options and Futures (MBA)

Rotman School of Management, University of Toronto

Toronto, Ontario

Bachelor of Commerce (Specialist in Finance and Economics; Major in Economics)

2017 – 2021

– **Academics:** cGPA 3.74/4.0

– **Awards:** Dean's List x 4, Graduated with High Distinction, New College Council In-Course Scholarship (\$1,000),

– **Relevant Courses:** Advanced Corporate Finance (A), Investments (A+), Managerial Negotiations (A+), Microeconomic Theory (A+)

INDUSTRY CERTIFICATIONS

– Canadian Securities Institute: Canadian Securities Course

2023

– Corporate Finance Institute: Accounting, Corporate Finance, DCF, Excel, Fixed Income, M&A

2023

– The Marquee Group: DCF Modeling, Financial Accounting, Merger Modeling

2023

PROFESSIONAL EXPERIENCE

National Bank Independent Network

Toronto, Ontario

Account Manager

2021 – 2023

– Resolved operational inquiries and led service meetings for 5 client firms accumulating \$10+ billion in assets under administration

– Assisted client firms across security management issues pertaining to private sales, trade allocations, distributions, and market events

– Built client firms reports on their accounts' investment holdings, trading data, documentation information, and client profiles

– Instructed reconciliation of mutual fund, systematic plan, trading, and transfer discrepancies for client firm accounts

– Guided client firms' investment advisors across setting up and modifying registered plan contributions and withdrawals

National Bank Financial

Toronto, Ontario

Wealth Management Analyst (Part Time)

2020 – 2021

– Worked to onboard 7 new investment advisors and their 1500+ clients across bank operational and compliance procedures

Summer Analyst, Wealth Management Rotation Program

Summer 2020

– Conducted equity research on rare earth producing companies for an investment advisor, utilizing Capital IQ and Excel to do so

– Created a global indexed and currency-hedged ETF model portfolio for an investment advisor to use as the basis of client portfolios

– Wrote a personal finance article titled "A Teenager's Guide to Investing; How Easy it Can Be and Why it is so Important?"

Fixed Income Trading Analyst

Summer 2019

– Analyzed trends and determined predictor variables (via linear regression analysis) for Japanese net purchasing of Canadian debt

– Examined team trading volumes and closing rates on client inquiries, and presented my findings to the team's managing directors

– Quantified North American political parties' macroeconomic and financial market performances for pre federal election analysis

– Updated and sent the daily corporate bond offering sheet (issuer, maturity, yield, credit rating) to 600+ clients via Bloomberg

Morningstar

Toronto, Ontario

Data Analyst

Summer 2018

– Built a data dictionary across 50+ parameters for 7600+ variables in the Computerized Portfolio Management Services (CPMS) product

– Created a CPMS product client list, using Salesforce and Excel to match 1000+ corporate and retail accounts to a client persistent ID

– Constructed investment strategies with the CPMS product in weekly team meetings to test the product from a client perspective

EXTRACURRICULAR ACTIVITIES

Rotman Commerce Law Association

Toronto, Ontario

President

2019 – 2020

– Designed all organizational events and initiatives, and mobilized 5 directors and 20+ members across tasks to execute them

– Managed corporate relations in order to secure industry sponsorships and representatives for networking events

Director of Events

2018 – 2019

– Led a 6 person committee to manage all event logistics such as venues, decorations, catering, presentations, and MC duties

PERSONAL

– **Technical Skills:** Familiar with Bloomberg Terminal Services, Capital IQ, Microsoft Excel, Morningstar CPMS, Stata

– **Interests:** Cooking (South and East Asian), Golf, Ice Hockey, Passionate New Jersey Devils Fan