

Fiona Trepanier

EDUCATION

Rotman School of Management & Department of Economics, University of Toronto Toronto, Ontario
Master of Financial Economics *Expected June 2026*

- **Award:** Graduate Entrance Scholarship (\$8000)
- **Relevant Courses:** Options and Futures (MBA), Econometrics (MA), Corporate Financing (MBA), Financial Economics (MA)

University of Toronto Mississauga, Ontario
Bachelor of Commerce, Finance and Economics Specialist *Sep. 2020 – Apr. 2024*

- **Academics:** cGPA 3.90/4.0
- **Awards:** CFA Student Scholarship (\$2000), Dean's List 2021-2024, Graduated With High Distinction
- **Relevant Courses:** Fixed Income Markets (A+); Quantitative Finance (A+); Investments (A+); Equity Valuation and Analysis (A+); Entrepreneurial Finance and Private Equity (A+); Financial Distress and Insolvency (A+)

INDUSTRY CERTIFICATIONS

- Passed CFA Level I 2024
- Canadian Finance Institute (CFI): Fixed Income, Corporate Finance, and Financial Analysis Fundamentals 2024
- Canadian Securities Certificate (CSC) 2022

PROFESSIONAL EXPERIENCE

University of Toronto Toronto, Ontario
Research and Teaching Assistant *Jan. 2023 – Present*

- TA for Business Finance I (MGT231), Business Finance II (MGT232), Entrepreneurial Finance and Private Equity (MGT495)
- Taught 60+ students in tutorials, hosted office hours, invigilated 15+ hours, and graded 700+ midterms/finals
- Analyzed 4000+ SEC and DOJ cases using Excel for research on fraud in entrepreneurship

Worldsource Securities Toronto, Ontario
Intern – Trading Analyst *Sep. 2023 – Mar. 2024*

- Used VBA code and Excel macros to automate 5 financial reporting tools
- Reduced the time required to extract reporting insights from 10+ hours each month to minutes
- Researched CIRO investment regulations to develop ethics and legal training modules for Advisors

Royal Bank of Canada Toronto, Ontario
Intern – Portfolio Management Analyst *May 2023 – Aug. 2023*

- Wrote VBA code to access FactSet live data in Excel to automate RBC's portfolio performance tools
- Built an Excel calculator that reduced the time required to calculate unrealized gains from 12+ hours to seconds
- Shadowed multi-asset strategy analysts to monitor yield curve movements and design trade recommendations accordingly
- Used Excel to value 4 projects through NPV and IRR analyses that were presented to RBC WMC senior management

EXTRACURRICULAR ACTIVITIES

CFA Society Toronto Toronto, Ontario
CFA Ambassador *Sep. 2023 – Apr. 2024*

- Offered career guidance, study resources, and scholarship opportunities to CFA candidates
- Answered curriculum questions regarding portfolio management, derivatives, fixed income securities, economics, and ethics

UTM Capital Management Mississauga, Ontario
Senior Analyst *Oct. 2021 – Mar. 2023*

- Helped lead a team of analysts in conducting macroeconomic and fundamental research on the technology industry
- Used Python to code the efficient frontier of a portfolio and recommend the efficient security weightings
- Established detailed forecasting assumptions and bear/bull cases for DCF, DDM, and relative equity valuations

PERSONAL

- **Technical skills:** Familiar with Bloomberg Terminal Services, R, Stata, VBA; Proficient in FactSet, Excel, and Python
- **Cross Country:** Provincial competitor in 3km, 5km, and 8km races; Athlete of the Year 2020
- **Interests:** Concerts (61 from 2021-2024), rowing, reading, former Irish dancer