

# Beau Johnson

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## EDUCATION

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### **The University of Vermont**

**Burlington, VT**

*Bachelor of Arts: Psychological Sciences*  
*Associates Degree: Business Administration*

2014

- **Honors:** NCAA D1 Athletic & Academic Scholarship
- **Relevant Coursework:** Investment Analysis, Financial Modeling, Portfolio Evaluation

## WORK EXPERIENCE

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### **Richardson GMP**

**Toronto, ON**

*Analyst, Capital Markets Products & Services*

October 2016 – Present

- Advise Investment Advisors on their portfolio applications. Analyze and resolve technical questions regarding the financial data integrity of the portfolio applications.
- Completed pitch documents, conducted due diligence meetings and launched our new SMA 2.0, Inform and our Client Onboarding System Portal on a nation-wide roadshow.
- Ad hoc Investment Advisors inquires regarding their client performance calculations, yields and tax reporting to ensure accurate data for client presentations.
- Managing a team in developing complex data analysis test cases and deploying new portfolio applications across our current platforms.

### **Richardson GMP**

**Toronto, ON**

*Associate, Wealth Management*

November 2014 – October 2016

- Providing ongoing analytical and administrative support to our team managing \$800 million in HNW client assets and assisting with quarterly portfolio evaluations.
- Opening new accounts, conducting internal and external transfers, preparing daily transaction reports, processing settlements of estates and maintaining efficient correspondence with our compliance department.
- Participated in raising capital through new issues, private and public financing.
- Advising on share price movements, market trends & sector movements using Quantitative analysis.

### **Varsity Men's Soccer Team**

**Burlington, VT**

*Team Captain, D1 Athlete*

August 2010 – May 2014

- Elected team captain by coach and teammates after demonstrating clear leadership capability and consistently performing under pressure. Led my team to a first American East conference final since 2007.
- Successfully balanced a full academic course load with the high demand of a 20+ hour a week of training, travel, and competition to achieve All-Conference honors.
- Helped my team establish a presence in the community by hosting ID soccer workshop trainings that led to the successful recruitment of three scholarship recipients.

## CERTIFICATIONS

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- Enrolled CFA Level 1 December 2019
- Wall Street Prep: Financial Modelling Boot Camp March 2018
- Canadian Securities Course October 2015