Dean Yoshida

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EDUCATION

2009 **WILLIAMS SCHOOL OF BUSINESS - BISHOPS UNIVERSITY** Sherbrooke, QC

Bachelor of Business Administration in Finance and Economics

- Member of the Bishops University Commerce Society
- Varsity Lacrosse Player

- **CHARTERED INVESTMENT MANAGER (CIM)**
- **PASSED LEVEL 1 OF THE CFA PROGRAM**

PROFESSIONAL EXPERIENCE

2018 –2019 **OWENS MACFADYEN GROUP – MULTI-FAMILY OFFICE** Toronto, ON

Investment Advisory Committee Member

- Working directly with the CEO and managing partner, created a comprehensive business development strategy for the firm, which included identifying and developing relationships with prospective clients and key COI's.
- Managed prospect and client relationships by providing customized advice regarding investment strategy, tax & estate planning, and cash flow forecasting; and coordinated the activities of client' other professional advisors (legal, accounting, real estate)
- Created and wrote monthly global macroeconomic update that was delivered to the advisory team.

2015 – 2018 **QUADRUS INVESTMENTS/GREAT WEST LIFE, WEALTH MANAGEMENT** Toronto, ON

Investment Consultant

- Built new, and managed existing relationships with senior advisors with a focus on increasing revenue.
- Created RFP presentations and maintained client data in CRM database.
- Delivered presentations to advisory teams promoting internal fund strategies.
- Built and updated HNW fund offering decks and income projection spreadsheets.
- Prepared quarterly market commentary, both at the fund level as well as Marco economic data for HNW client reports.

2013 – 2015 **i3 ADVISORS / BANK OF NEW YORK MELLON, WEALTH MANAGEMENT**

Toronto, ON

Investment Analyst, Advisory Services

- Assisted in allocation of $500 million in assets held by ultra high net-worth clients, pension plans, foundations, endowments and other institutions.
- Synthesized data and conducted qualitative and quantitative macroeconomic, sector and thematic investment research in order to determine how global events, conditions, and fundamentals would impact client portfolios.
- Work with Portfolio Managers in developing client specific investment strategy solutions, which include asset mix structure, investment strategy composition and tactical portfolio changes.
- Analyze investment opportunities and develop investment strategy recommendations by performing fundamental and quantitative investment analysis across traditional equity and fixed income strategies as well as alternative asset classes such as hedge funds and private equity funds.
- Produce quarterly presentations and reports which review the general state of the economy, stock/bond market performances both domestically and internationally, economic trends and changes in regulations affecting investments.
- Perform portfolio optimizations on asset allocations and develop risk management modeling techniques.
- Maintain and develop client relationships, acting as primary contact for informational and performance-related requests.

2011-2013 **HSBC BANK OF CANADA** Vancouver, BC

Private Client Associate

- Offered banking clients investment advice including investment selection and retirement planning.
- Prepared both personal and small business loan documents for underwriting.
- Prepared presentation and performance materials used in client and prospect meetings.
- Provided investment counselors with ad-hoc projects including marketing material and client presentations.