

# WALEED KHAN

CPA, CGA

## DIRECTOR BUSINESS DEVELOPMENT

Mississauga, Ontario  
(647) 996-7464  
Waleed.Khan@alumni.utoronto.ca

### SKILLS

Client Acquisition, Client Enhancement, Marketing Strategy, Conference Presentations, Q&A Panels, Team Leadership, Project Management, Communication, Change Management, Relationship Building, Process Improvement

### TECHNOLOGY

- Advanced MS Excel
- Database Management
- Multiview Financial System
- Adaptive Insights Planning
- MS PowerPoint
- MS Word

### ACHIEVEMENTS

- Successfully led several presentations at conferences resulting in revenue growth
- Created Executive Dashboard
- Implemented budgeting system
- Streamlined month-end process by integrating accounting system with forecasting system

### EDUCATION

Bachelor of Commerce  
University of Toronto 2008

CPA, CGA 2014

## SUMMARY

Accomplished business development leader offering over 11 years of professional experience. Creative and energetic marketer with proven experience in consistently penetrating new markets to ensure sustainable revenue growth. Demonstrate exemplary communication and in-person meetings to establish presence and build a positive brand while fostering client engagement. Proficient at working to achieve goals both as a cross-functional team member and individual contributor.

## PROFESSIONAL EXPERIENCE

### DIRECTOR, BUSINESS DEVELOPMENT

*Royal Arc Developments*                      *Oakville, ON*                      *Sep. 2018 – Current*

- Lead & execute the Company's marketing strategy.
- Develop, implement & evaluate both short & long-term strategic business plans.
- Drive brand growth with thoughtful implementation of strong programs.
- Develop effective, creative, and customized proposals and presentations to bundle service offerings that effectively convey the Company's capabilities.

### MANAGER, FINANCE & INVESTOR RELATIONS

*AGF Management Ltd*                      *Toronto, ON*                      *Dec. 2014 – Sep. 2018*

- Prepared external investor related communication, including IR presentations, earnings script and board reporting material.
- Composed presentation material to potential investors at conferences and one-on-one investor meetings for CEO, CFO and President.
- Established and monitored KPIs for various departments
- Prepared the quarterly press release, AGM material, MD&A and financial statements to ensure the investment community issues are addressed.
- Developed the IR strategy and plan, including investor targeting.
- Managed a team of 7 analysts, including month-end financial reporting, compensation accounting, and oversight on financial systems.
- Reviewed quarterly and annual consolidated financial statements with notes.
- Prepared fiscal budgets and quarterly forecasting for various departments.
- Monitored overhead spending and trends against budget and quarterly review with department heads.
- Reviewed monthly and quarterly consolidated/subsidiary monthly reports and quarterly board reports to facilitate decision-making.
- Maintained good working relationships with internal departments, auditors and vendors.

### SENIOR ACCOUNTANT

*AGF Management Ltd*                      *Toronto, ON*                      *Jul. 2011 – Dec. 2014*

- Performed complex analysis of financial data such as intercompany transactions, compensation accounting, hedge accounting & intangibles.
- Prepared quarterly and annual financial statements with notes.
- Analyzed operating accounts; prepared reconciliations, and adhoc. reports.

### SENIOR ACCOUNTANT

*State Street Corp.*                      *Toronto, ON*                      *May. 2008 – Jul. 2011*