

ALEX LEE

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Introduction

A business strategist with some roots in science who seizes opportunity and problem solves using combination of Occam's Razor and First Principles' approaches in order to create solutions that maximize return on investment. Known for adapting quickly and facilitating conversation in order to lead teams effectively.

Skills and Interests

- **Business Strategy and Development**
- **Financial Modelling and Analysis**
- **BMC certified**
- **Financial Modelling experience**
- **Project/Event Management**
- **Fund Accounting**
- **Customer Service**
- **Advanced Excel, Word, Access, PowerPoint, VBA, Project**
- **FAST reporting system experience**
- **Expert Macro**
- **Extensive knowledge of Windows based systems and computer hardware**

Work Experience

Analyst (Temp), Webcom Networks Inc, *Toronto, ON* Nov/2016 – Feb/2017

- Executed event based investment strategy and effectively monitored 7 different sources in real time.
- Ad-hoc research
- Utilized Bloomberg, Reuters and Macro programs

Financial Analyst (Budget & Forecast), *UOIT, Oshawa, ON* Sept/2015 – April 2016

- Suggested and executed automated data consolidation process efficiency improvements through the usage of VBA programming that decreased a task execution time from 1-2 hours per month to 2 minutes, while eliminating human error in the consolidation process.
- Executed User Acceptance Testing
- Analyzed budget/forecast data for variances using Microsoft Excel.
- Large Spreadsheet, VLookup and Pivot Table experience.
- Created and edited presentations that work as tutorials for external parties, future analysts, as well as those utilized by the project manager for presentations.

Self Employed Investor, *Oshawa, ON* Dec / 2013 – Current

- Researched global markets, managed multiple portfolio's, invested in currency, and executed on arbitrage opportunities in the equities marketplace.
- Thrived without physical guidance and under immense pressure.

Managing Partner/Property Manager, *1249895 Ontario Ltd/1413211 Ontario Ltd* Apr / 2010 – April 2016
Toronto, ON

- Point of Contact and Service for 117 units.
- Handled cash/rent deposits and implemented budgeting system
- Enforced and negotiated the terms of leases and contracts (values \$1,200 – \$450,000) for a total of 117 total apartment units.

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- Provided customer service, conflict resolution, researched and created models to help increase the revenue generated such as rooftop solar FIT projects, further development of land and segregated hydro/water metering.
- Project Management of regular maintenance and contract work.
- Creative problem solving - saved the companies thousands of dollars by refinishing flooring that was recommended to be replaced with innovative product usage, and creating replacement handrails rather than purchasing prefabricated ones.

Professional Experience

- Director at Large**, *COTERC, Ajax Ontario* Apr / 2015 – Sept/2015
- Director of Marketing**, *COTERC, Ajax Ontario* Sept/2015 – Dec/2016
- Project Management: Revamping of this organization's website, promotional and educational material.
 - Business development experience (Co-developed campaigns to increase membership base and profitability).
 - Contract Negotiation.
 - Main fundraiser project (one night) went from a near breakeven in 2014 to a profit of \$3771 from the following event, with ~70 attendees. Many promised to bring more guests to future events.

- Primary Researcher**, *Downtown Whitby Development Steering Committee, Whitby, ON* Aug/2015 – April 2016
- Conducted primary research and support the creation of a Business Association (B.A) to foster development in the town. My team's objective was to determine the least objectionable model based on the feedback of over 200 business owners.
- Research: Created and executed unbiased interviews and surveys to ensure that accurate data was obtained.
 - Data analysis and reporting of research.
 - Presentation experience: Presented our findings and future recommendations to the DWDC, the Whitby Chamber of Commerce and the Planning and Development council of Whitby.

Awards/Achievements

- Rotman International Trading Challenge** (Trading Cases: Credit Risk (Bond Analysis), BP Commodities, S&P Capital)
- Leadership: Vice Captain and senior trader; Guided Jr. Traders.
 - 6th place Credit Risk team.
 - 12th place BP Crude/RBOB trading team.
- Canadian University Trading Challenge** (Investment Banking, Portfolio Management, Forex trading, Equity trading)
- Overall 3rd place team.
 - Best Individual Forex trader award.

Education

- Python II (programming language)**, Grok Learning Ongoing
- Business Intelligence Concepts**, University of Colorado (through Coursera) November / 2016
- Project Management Course**, University of California (through Coursera), October / 2016
- Canadian Securities Institute**, Canadian Securities Course, *ON, Canada* August / 2015
- UOIT**, B.Comm Honours - Finance Major, *Oshawa, ON, Canada* April / 2016