

James Boulter

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EDUCATION

Queen's University

Bachelor of Commerce

Kingston, Ontario

2017 – Present

- **Relevant Courses:** Financial Statement Analysis & Valuation (A+), Financial Accounting (A+), Principles of Economics (A)
- **Exchange:** Completed winter 2020 semester abroad at Universidad Carlos III de Madrid in Spain

PROFESSIONAL EXPERIENCE

Burgundy Asset Management

Intern Analyst

Toronto, Ontario

September 2019 - Present

- Currently working remotely for the U.S. Large Cap team; scheduled to return summer 2020

Summer Analyst

Summer 2019

- Completed a 17-week internship within Burgundy's 30-person investment team, working with the U.S. Large Cap and Canadian Large Cap teams
- U.S. Large Cap: Select Project Experience
 - Cruise Line Industry
 - Independently researched and led the construction of a new file on the North American cruise line industry
 - Assessed the competitive positioning, corporate strategies and management teams of the three industry leaders
 - Created a 14-year, three-statement historical financial model to determine industry cyclicality, profitability and operating leverage
 - Defense Industry
 - Analyzed a recent merger involving a core portfolio company; created a 52-page report detailing transaction terms, strategic rationale, potential for synergies and the financial profile of the merged entity
- Canadian Large Cap: Select Project Experience
 - Auto Parts Manufacturing Industry
 - Independently researched and led the construction of a new file on a large Canadian auto parts manufacturer
 - Profiled the company's historic evolution and assessed its current investment merits through the use of regulatory filings and conversations with industry experts
 - Compiled 60 years of data on North American population and household growth, auto sales, auto ownership, and auto scrappage rates to create a forecast for normalized future auto production levels
 - Presented findings to Burgundy's Chief Investment Officer, Director of Research, and the Canadian Large Cap team

RBC Royal Bank

Client Advisor

Owen Sound, Ontario

Summer 2018

- Completed an 18-week internship in the Personal and Commercial Banking division; received a summer 2019 return offer
- Delivered professional and insightful service to over 50 clients on a daily basis, concluding internship with:
 - \$570,000 in referred business to mortgage and investment specialists, exceeding intern role expectations
 - \$150,000 in secured client investment purchases, surpassing assigned summer sales targets
- Received client satisfaction survey scores of 100% each month; regionally recognized by management for retailing excellence

EXTRACURRICULAR ACTIVITIES

Queen's University Investment Counsel (QUIC)

Senior Portfolio Managers (Consumers)

Kingston, Ontario

2019 – Present

- Work with a team of 33 students to manage a \$1.4M portfolio of Canadian and U.S. equities on behalf of the Queen's University Endowment Fund and Mackenzie Investments
- Prepare investment memorandums, stock pitches, and holding analyses for the ~\$113,000 Consumers portfolio to present at QUIC public meetings on a tri-weekly basis

Queen's Varsity Swim Team

Varsity Athlete

Kingston, Ontario

2017 – Present

- Train 7 times per week throughout the academic year (14 hrs/week); represent Queen's at collegiate swim meets across Ontario
- 2019 OUA Swimming Championships finalist (200m Backstroke); 4-time national and provincial level finalist before competing with Queen's

Oil Thigh Designs (OTD)

Business Consultant

Kingston, Ontario

2019 – 2020

- Internal consultant for a retail business that generates annual revenues over \$160,000 with all net proceeds donated to charitable organizations
- Analyzed customer base interests through online questionnaire; developed first-ever OTD newsletter aimed at increasing y/y in-store sales

ADDITIONAL INFORMATION

- **Professional Certifications:** Canadian Securities Course (CSI / Moody's Analytics) completed in summer 2018
- **Volunteering:** Rotary Club of Warton community volunteer, Conservative Party of Canada riding association member
- **Interests:** Piano (Grade 8 Royal Conservatory of Music certified pianist), classic rock & blues music history, travelling, biographies, podcasts