

Max Bernardi

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EDUCATION

Queen's University

Bachelor of Commerce

Kingston, Ontario

2018 – Present

- **Academics:** Cumulative GPA of 3.99/4.30; Principal's Scholarship and D.I. McLeod Dean's List Scholarship recipient
- **Relevant Courses:** Business Management (A), Business Decision Models (A+), Financial and Management Accounting (A+), Finance I (A)
- **Exchange:** Scheduled to complete winter 2021 semester abroad at Grenoble École de Management in Grenoble, France

University of Toronto Schools

Ontario Secondary School Diploma

Toronto, Ontario

2014 – 2018

- Final GPA: 96% | Student Ambassador Council | Langford Rowell Scholarship Recipient | UTS War Memorial Scholarship Recipient

PROFESSIONAL EXPERIENCE

CIBC Wood Gundy

Administrative Assistant

Toronto, Ontario

Summer 2019

- Completed a 14-week internship at CIBC Wood Gundy for financial advisor with over \$300M in assets
- Produced client updates that analyzed performance for high net-worth clients across various investment strategies (value, growth, dividend)
- Developed Excel macros to organize large data sets of independent asset manager holdings by industry, geography, and portfolio value, saving approximately one hour per report per quarter
- Prepared daily commission and activity reports to track client account transfers and withdrawals
- Trained a new administrative assistant that was hired during internship to take over responsibilities at the end of work term

Salvation Army

Sports Director

Toronto, Ontario

Summer 2017 & 2018

- Designed and led sports classes for the Salvation Army's summer camp for children ages 3-14, 80% of which were non-English speaking
- Led a team of 8 other counsellors to organize and implement a variety of physical activities for 150+ children four times per week
- Increased enrollment of the sports section by 80% within 4 months by building trust and camaraderie with parents and children
- Acted as a touchpoint for parents by answering all questions and describing upcoming activities such as theme days and field trips
- Led a team of counsellors in organizing a group of 30 children with varying levels of English proficiency on a field trip to downtown Toronto

EXTRACURRICULAR ACTIVITIES

Queen's University Investment Counsel (QUIC)

Portfolio Manager (Industrials)

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 and holding analyses to present at public QUIC meetings on a tri-weekly basis to aid in the security selection process and exploration of industry trends; analyze stocks in the Industrials sector portfolio with an AUM of ~\$120,000
- Placed first in annual QUIC Deal Competition, analyzing Conagra Brands' acquisition of Pinnacle Foods and presenting a full transaction analysis to a panel of institutional investors using a merger model, DCF, NPV synergy analysis, and precedent transactions
- Previously was an Analyst in the Financial Institutions Group (FY 2019 US alpha of 7.53%) and co-authored pitch on PYPL; investment theses included customer integration across various money-transfer platforms, merchant ease of use, capital allocation strategy, and R&D initiatives

Queen's Finance Association Conference (QFAC)

Sponsorship Co-ordinator

Kingston, Ontario

2019 – Present

- Work with a group of students at Queen's to plan and execute Canada's most prestigious undergraduate finance conference, attracting over 90 delegates from universities across North America
- Maintain and build relationships with institutional sponsors and develop creative plans to meet all needs of sponsors while balancing logistics

University of Toronto Schools Varsity Hockey Team

Captain

Toronto, Ontario

2016 – 2018

- Led high school varsity hockey team to first city finals appearance in decades
- Trained and developed the skills of six new hockey players; acted as a mentor by building their on-ice confidence
- 2015 TDCAA silver medalist; named high school MVP in 2018 in recognition of extraordinary performance, dedication, and teamwork

ADDITIONAL INFORMATION

- **Athletics:** Assistant Captain in Greater Toronto Hockey League with 10-year playing history; intramural hockey player at Queen's University; recipient of Frank D. Smith Midget A Scholarship recognizing a player who achieves a high standard of excellence academically and in hockey
- **Interests:** Avid wakeboarder, passionate about Italian cooking, personal fitness, and fan of the NHL and NBA
- **Travel:** Tokyo, Sydney, Italy and numerous countries in South America; most recently enjoyed a fishing trip with family in Thunder Bay
- **Technical Skills:** Microsoft Suite (Excel, PowerPoint, Word), Bloomberg, Capital IQ, moderate French proficiency