

Max Bernardi

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EDUCATION

Queen's University Kingston, Ontario
Bachelor of Commerce 2018 – Present

- **Academics:** Cumulative GPA of 4.01/4.30; Principal's Scholarship and D.I. McLeod Dean's List with Distinction (top 10% of class)
- **Relevant Courses:** Business Management (A), Business Decision Models (A+), Financial and Management Accounting (A+), Finance II (A+)

University of Toronto Schools Toronto, Ontario
Ontario Secondary School Diploma 2014 – 2018

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

PROFESSIONAL EXPERIENCE

Bain & Company Toronto, Ontario
Associate Consultant Intern Summer 2021

- Scheduled to complete the 10-week Associate Consultant Intern Program

Skye Global Management New York, New York
Summer Intern Summer 2020

- Completed internship in the 3-person investment team of Jamie Sterne's long/short growth technology-focused hedge fund with ~\$1.5B AUM
- Independently initiated coverage on the Contact Center as a Service (CCaaS) industry and created a 50-page report that analyzed industry outlook, customer segments, market leaders' competitive positioning, management teams and notes collected from 1-on-1 calls with former executives
- Developed "Buy Recommendation" on market leader based on current duopoly positioning, accelerating adoption of CCaaS, and barriers to entry
- Assisted in creating valuation model that was driven by industry shift from on-prem to cloud solutions and the company's growing market share

CIBC Wood Gundy Toronto, Ontario
Administrative Assistant Summer 2019

- Completed a 14-week internship at CIBC Wood Gundy for a 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 1 hour per report per quarter

EXTRACURRICULAR ACTIVITIES

Queen's University Investment Counsel (QUIC) Kingston, Ontario
Portfolio Manager (Industrials) 2019 – Present

- Work with a team of 35 students to manage a \$1.8M 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 (QFA) Kingston, Ontario
Sponsorship Co-ordinator 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 Toronto, Ontario
Captain 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