

## Education

### **CPA Ontario – Successful CFE Writer (September 2023)**

### **University of Toronto Scarborough (Class of 2021)**

- Bachelor of Business Administration – Management Co-op (Specialist in Accounting, **CGPA: 3.79 out of 4.0**, Deans List 2017-2021, Teaching Assistant – Introduction of Financial Accounting II)

## Summary of Qualifications

- 5+ years of experience leading cross-functional squads to build solutions and execute project deliverables. Expert in Agile/SAFe methodologies, product roadmapping, and managing high-stakes product backlogs.
- Master storyteller with a CPA-backed ability to present product visions, financial impacts, and technical roadmaps to C-suite executives and global stakeholders.
- Proficient in Excel, Jira, Confluence, Power BI, Tableau, MS Visio, SharePoint, Access, and PowerPoint
- Exceptional product management experience, experience in agile methodology, strong financial and data analytical skills, IT & internal audit experience, process mapping, control testing, risk assessment, account reconciliation, and project management experience demonstrated through various work experiences and client-facing roles
- Knowledgeable in risk compliance frameworks such as (SOC 1, SOC 2, ISO 27001, NIST CSF, COBIT, Hi-Trust, etc.) by carrying out successful IT General Controls (ITGC), and Internal Controls for Financial Reporting (ICFR) engagements
- Experience operating SAP systems, Archer, Financial Information System (FIS) & Human Resource Information System (HRIS)
- Strong written and verbal communication skills in English; also proficient in French, Cantonese, & Mandarin

## Certifications

- **Certified SAFe® Scrum Master** (Scaled Agile Inc. - 2025)
- **Career Essentials in Data Analysis by Microsoft and LinkedIn** (2024)
- **SQL: Data Reporting & Analysis** (LinkedIn Learning - 2023)
- **Data Analytics: 1 Foundations** (LinkedIn Learning - 2023)
- **From Excel to Tableau** (LinkedIn Learning - 2023)
- **Financial Information System (FIS) Standard Curriculum** (2019)

## Work Experience

### **Capco - Senior Consultant (August 2024 – Present)**

#### **Strategy Consultant - Tier One Bank, Cost Optimization and Business Transformation (February 2026 - Present)**

- Evaluated legacy banking workflows to identify high-potential areas for AI integration, developing business cases for automation initiatives aimed at increasing operational efficiency and reducing long-term technical debt.
- Created and owned a strategic financial forecasting model for Canadian Personal and Business Banking, integrating target roadmaps and multi-year cost drivers to bridge a \$550M savings gap through FY30.
- Partnered with cross-functional business segment leaders to translate operational requirements into a unified financial strategy, ensuring alignment between departmental goals and the bank's long-term transformation roadmap.
- Synthesized complex financial datasets into executive-level insights and actionable takeaways, enabling leadership to prioritize high-impact initiatives and optimize resource allocation across the enterprise.

#### **Strategy Consultant - Tier One Insurance Provider, Cybersecurity Team (November 2025 - January 2026)**

- Successfully created a sophisticated cyber risk quantification framework and model utilizing FAIR methodology and Monte Carlo simulations, and used this data to translate complex risks into actionable business insights.
- Synthesized technical model outputs into a high-impact "C-suite package," successfully influencing executive leadership on multi-million dollar strategic investment decisions.
- Collaborated with the internal team and hosted 3-day workshops to provide strategic direction and insights on cyber risk quantification
- Provided a detailed 6-month future state roadmap and process documentation to enable the team to continue model enhancements and BAU activities, bridging the gap between current technical limitations and long-term business objectives.

#### **Product/Delivery Manager - Tier One Payments Provider, RTR (Real Time Rails) - Fraud (February 2025 - October 2025)**

- Led two cross-functional Agile squads (UX, Engineering, QA); owned the pod's end-to-end product roadmap, backlog prioritization, and project delivery timelines for a high-visibility Real-Time Rails (RTR) fraud platform
- Provided status reporting and risk management, in alignment with enterprise program management processes and governance standards, and communicated to executive leadership
- Led the discovery-to-launch lifecycle for three major product milestones (UAT, industry testing, etc), managing inter-team dependencies and technical trade-offs to ensure on-time delivery of a mission-critical payments solution.
- Championed the product vision to senior leadership and the EPMO, utilizing data-backed insights to gain alignment on feature prioritization and risk mitigation strategies.
- Facilitated rapid feedback loops and retrospectives to iterate on product features, improving squad velocity, and ensuring the final build met all operational requirements and constraints per the PRD.

#### **Strategy Consultant - Tier One Bank. Enterprise Protect Division (August 2024 - January 2025)**

- Tracked and analyzed the monthly status of enterprise risks and presented to key stakeholders at the Senior Manager, AVP, and VP levels
- Helped redefine the operating procedure and process documentation for enterprise risk issue analysis and reporting
- Led and established governance and program management structure for enterprise risk management to address MRA requirements
- Led the successful rollout of new workflow stages within the GRC system to improve the quality of records ingested, acting as the bridge between business stakeholders and technical developers to ensure the solution met real-world user needs.
- Conducted key analysis of thematic issues, red key risk indicators, regulatory observations, and high residual risk control exceptions periodically and recommended decisions on elevation as enterprise issues based on analysis and discussion with key business stakeholders such as business information security officers, technology asset owners, and VPs

#### Deloitte Canada - Multiple Roles (June 2020 - August 2024)

##### **Senior Consultant - Risk Advisory, IT & Specialized Assurance, Internal Audit (December 2023 – August 2024)**

##### **Consultant - Risk Advisory, IT & Specialized Assurance, Internal Audit (September 2021 – November 2023)**

- Testing of processes and IT General Controls (ITGC) and internal controls for financial reporting (ICFR) of numerous clients at an application, database, and server level for in-scope financial-related applications and their associated operating systems (Windows, AIX, Linux, Mainframe AWS, SAP, AS400) and databases (MS SQL, Oracle, DB2, PostgreSQL)
- Providing clients with guidance and recommendations to execute data conversions and system implementations successfully
- Led productive meetings and collaborated with teams across organizational levels to successfully carry out end-to-end engagement activities
- Effectively identified breaches in compliance and developed and communicated recommendations for deficiencies identified to improve control effectiveness and governing policies
- Assessed the sufficiency of cybersecurity programs of clients, along with aiding in analyzing the impact of any cybersecurity breaches.
- Spearheading requests for proposals for future projects and successfully landing 3 new opportunities for the organization

##### **Financial Analyst - Controllershship (June 2020 – December 2020)**

- Performed effective data analysis on SAP extracts, developed control testing templates in Excel, & data flow mapping with MS Visio
- An integral part of upgrading the GRC process through testing and analyzing areas of improvement in the internal processes
- Accurate preparation of journal entries, financial statements, and reconciliation in accordance with financial reporting standards
- Tested and designed controls for key areas to mitigate risk, including user access review, logical access, & segregation of duties
- Effectively work with colleagues in different teams to provide support on compliance projects and a forward-focused outlook to identify issues and opportunities to improve the reporting process

#### University of Toronto St. George, Faculty of Arts and Science Finance Office

##### **Financial Officer Co-op (January 2019 – August 2019)**

- Pivotal role in the implementation of the annual budget (approx.\$600 million) in SAP and developed budget analysis skills
- Managed year-end reconciliation processes, PTR merit funding allocations, market comparators for Professional Masters Programs, Target Budget Letters issuance for the new fiscal year, and budget carry-forward processes
- Demonstrated strong attention to detail and analytical skills when performing first-level audits on F/S from over 60 external units
- Accurately recorded and processed over 1000 accounting transfers, debit memos, and other funding transactions within SAP
- Verified records of over 650+ employees in HRIS and helped manage and clean up multiple Graduate databases

#### Co-Curricular/Volunteer Experience

##### **Association of Accountancy - Corporate Relations Director (April 2018 – April 2019)**

- Serving as the primary liaison for AOA and all external partners throughout the year and ensuring strong personal relationships
- Developing and executing outreach strategies to secure new sponsors and partners, successfully bringing in 2+ sponsors per event

#### Achievements

- **Deloitte Silver Dot Award for Outstanding Contribution** (December 2022, March 2023, & June 2023)
- **Dean's List** (2018, 2019, 2020, 2021)
- **Ernst & Young Scholarship in Commerce** - \$5,000 (2020)
- **University of Toronto – Scarborough Frank Faubert Scholarship** - \$12,000 (2017)
- **Ontario Volunteer Service Award** (2015)

#### Interests

Gaming (Specifically Valorant), Basketball, Volleyball, Ping Pong, Fitness, Cooking, Electronic Music, Snowboarding