

JADEN KWEK

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PROFESSIONAL SUMMARY

BBA & Financial Mathematics Graduate (**GPA 3.93**), **CFA Level I**, and **Level II candidate** (May 2026). Specialized in **Financial Modeling, Equities and Credit Research**, and **Data Analysis with R**. Proven track record in fixed income research and commercial underwriting.

EDUCATION

Wilfrid Laurier University

September 2020 - June 2025

Bachelor's, BBA & Financial Math Double Degree with Co-op

GPA: 3.93

- Concentrations: Finance (BBA) & Statistics/Data Analytics (Financial Math), Elizabeth Wang Mathematics Scholarship Recipient (2021)

CERTIFICATIONS

- CFA Level I (Nov 2023)
- Mensa Canada Member (2025)
- David Sobey National Retail Case Competition Finalist (2023)

PROFESSIONAL EXPERIENCE

Empire Life Investments

Toronto, ON, Canada

Fixed Income Investment Analyst Co-op

September 2023 - December 2023

- Engineered detailed financial models and scenario forecasts (Base/Bull/Bear) for Coinbase & MicroStrategy to evaluate solvency and debt service capacity, leading to a profitable buy recommendation on their convertible bonds.
- Conducted macroeconomic research by synthesizing Equifax and TransUnion data into Excel visualizations, analyzing delinquency trends to inform the team's credit risk outlook.

CNA Financial

Toronto, ON, Canada

Specialty Underwriting Co-op

January 2023 - April 2023

- Assessed risk for Directors & Officers (D&O) and Employment Practices Liability (EPL) policies by analyzing financial statements, corporate governance, and geopolitical factors, specifically for mining sector clients.
- Improved the underwriting workflow by using AI tools to automate Risk Referral Reports, cutting preparation time by 60% while manually validating data to ensure strict compliance.

Libro Credit Union

London, ON, Canada

Business Banking Analyst Co-op

May 2022 - August 2022

- Underwrote commercial mortgages and operating lines of credit ranging from \$300K to \$2M by analyzing financial statements, calculating Debt Service Coverage Ratios (DSCR), and verifying collateral values using MPAC property assessments.
- Conducted on-site due diligence visits with Relationship Managers to manufacturing and agricultural clients, inspecting assets and discussing business operations to support credit decisions.

McDonald's

Kitchener, ON, Canada

Crew Member

March 2017 - April 2021

- Delivered efficient customer service and operational execution across Drive-Thru and Grill stations, collaborating with team members to consistently meet speed-of-service KPIs during high-volume shifts.

Self-Employed

Kitchener, ON, Canada

Discretionary Trader

October 2024 - Present

- Execute multi-asset swing trades across crypto, equities, and commodities by analyzing global liquidity drivers (Global M2, TGA, Fed Balance Sheet) and ISM data to determine market risk appetite.

SKILLS

Skills: Excel, Bloomberg, Capital IQ, R, Financial Modeling, Credit Analysis, Mathematical Finance, PowerPoint/Keynote/Slides

Interests: Cameras, Computers, Watches, Esports, Fitness