

Jakob Bickley

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Education

B.Sc. Mathematics & Finance

Completed May 2026

University of Alberta

GPA: 3.9 / 4.0

- Awards: Louise McKinney Scholarship, Cathy Allard-Roozen Leadership Award, Thorleif M. Fostvedt Scholarship, I.M. May Denham Memorial Scholarship, Dean's Honour Roll.
- Selected Coursework: Corporate Finance, Financial Modelling, Risk Management, Statistical Analysis.

Passed CFA Level I Exam

Experience

Jr. Financial Analyst – Franvest Capital Partners

Feb 2026–Present

Edmonton, AB

- Analyzed operating company data to evaluate consumer behaviour, market trends, revenue performance, and operating KPIs for strategic and investment decision-making.
- Performed financial analysis and modelling across direct operating companies, private equity fund investments, real estate investments, and public market portfolios.
- Prepared public market reporting, including portfolio performance summaries, market commentary, and investment analysis for internal stakeholders.
- Built Power BI dashboards and promoted AI adoption by identifying automation opportunities, supporting training, and integrating AI tools into reporting workflows.

Underwriting Student – SGI (Saskatchewan Government Insurance)

May 2025–Aug 2025

- Analyzed commercial property and auto insurance submissions by reviewing operational data, financial statements, and exposure characteristics to support underwriting, pricing, and risk selection decisions.
- Designed and implemented Excel, VBA, and Python-based automation to streamline core underwriting analysis and reporting workflows, enabling faster turnaround and more consistent risk evaluation.
- Built financial models and automated dashboards tracking premiums, loss ratios, portfolio performance, and broker KPIs, reducing manual processing time by 40% and improving decision support.
- Performed data validation, control checks, and reconciliation of risk inputs while automating repeatable tasks to improve pricing accuracy, data quality, and workflow reliability.

Teaching Assistant & Residence Assistant – University of Alberta

Aug 2023–Feb 2026

- Evaluated 500+ Calculus I–III assignments and led weekly academic support sessions, ensuring consistent assessment standards while strengthening student understanding of mathematical concepts.
- Supported 45+ residents with academic, personal, and conflict-related challenges; awarded RA of the Year for leadership, sound judgment, and effective crisis and risk management.
- Managed incident documentation, policy compliance, conflict resolution, and coordination with campus safety teams in a high-responsibility student leadership role.

Technical & Financial Skills

Financial: Financial modelling, valuation, financial statement analysis, portfolio analysis, public market reporting, corporate finance, risk analysis, stress testing

Analytics: Consumer behaviour analysis, market trend analysis, KPI reporting, dashboarding, data visualization

Excel: Advanced formulas, PivotTables, VBA, Power Query, dashboards, scenario analysis

Programming: Python (Pandas, NumPy, data analysis, automation), R (regression, visualization), SQL basics

Tools: Power BI, Bloomberg Terminal, Microsoft Excel, Microsoft Office, Google Workspace, LaTeX, AI productivity tools