

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

Investment Analyst – Franvest Capital Partners (Family Office)

Feb 2026–Present

Edmonton, AB

- Perform valuation, financial modelling, budgeting and investment analysis across operating companies, private equity funds, real estate and public markets.
- Closed gaps in family-office investment reporting by reconstructing cash flows and assessing deal-level IRRs across four private real estate investments and validating return calculations for public securities and private funds.
- Identified opportunities to improve franchise sales and operations using data from 36,000+ customers, strengthening customer-value estimates and clarifying what drives repeat business and revenue to inform strategic decisions.
- Identified counterparty, ownership and operating-cost risks in nontraditional investments, translating commercial research and technical due diligence into decision briefs and negotiation priorities for principals.
- Built and enhanced multiple Power BI and web dashboards across portfolios and real estate, consolidating current performance information and reducing manual reporting and review.
- Applied AI tools across research, analysis and reporting to deliver up to 3x the output while maintaining quality and substantially reducing manual work.
- Collaborate with business leaders on strategic research, marketing and design, identifying gaps in lead capture and recommending practical improvements to sales follow-up.

Underwriting Student – SGI (Saskatchewan Government Insurance)

May 2025–Aug 2025

- Analyzed commercial property and auto insurance submissions using financial statements, operating data and exposure characteristics to support underwriting, pricing and risk selection.
- Built financial models and automated dashboards tracking premiums, loss ratios, portfolio performance and broker KPIs, reducing manual processing time by 40%.
- Automated underwriting analysis and reporting with Excel, VBA and Python, incorporating reconciliations, validation and control checks to improve data quality and workflow reliability.

Teaching Assistant & Residence Assistant – University of Alberta

Aug 2023–Feb 2026

- Taught Calculus I–III concepts in weekly academic support sessions and evaluated 500+ assignments.
- Supported 45+ residents, coordinated incident response and conflict resolution, and received RA of the Year.

Technical & Financial Skills

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

Analytics: Consumer behaviour, franchise performance, sales-funnel analysis, KPI reporting, 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 Office, Google Workspace, LaTeX, AI research and productivity tools