DANIEL J. TRUNZO, MBA, CFA III Candidate www.danieltrunzo.com

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CAREER OBJECTIVE

I am a dynamic, high energy professional seeking to bring success to a strong finance team by applying work experience and knowledge acquired throughout the MBA and CFA programs. I value and follow the CFA ethical standards and code of conduct.

EDUCATION

- **MBA** –**Finance Graduate**, John Molson School of Business Concordia University **June 2008**
  AACSB-Accredited (Association to Advance Collegiate Schools of Business)
  Winning team MBA International Case Competition John Molson School of Business Concordia University **Jan 2006**
- **CFA III Candidate**–Chartered Financial Analyst level 3 candidate
  Achieved 70-100% on 7 of the 9 topics tested on the CFA examinations levels 1 and 2 **Current**
- **CSC** –Canadian Securities Course **Sep 2005**
- **BCOMM** –**Bachelor of Commerce Business Management**, Ryerson University, Toronto Ontario **Apr 2003**

  I have been awarded 3rd prize in Ontario for developing a training program for customer service professionals. Part of Advanced Service Management course. Sponsored by Ryerson University, Issued by the Ontario Tourism Education Corporation (OTEC) **Apr 2001**
- **International Education –**Diploma in Business and Tourism Administration, Italy **Jun 1998**

TECHNICAL SKILLS

- Credit Analysis /Project Management/Financial reporting / modeling / analysis / Audit / Cash Flow / VAR.
- Statistical analysis pertaining to probability –distributions, significance testing and regression.
- Research of primary and secondary information with quantitative/ qualitative analysis- equity research.
- Charismatic Leader; experience in Transactional Leadership Skills, fostering a Contingent Reward Approach to leading and developing high performing teams.
- Advanced MS Office (Word, Excel, Access, Power Point), SAS, SPSS V10.0 Database, Bloomberg, Reuters Hyperion, Mainframe, Oracle 11i, SAP.

RECENT WORK EXPERIENCE

Saint Lawrence College

Associate Professor, accounting & finance **Aug 2008 - Oct 2008**

MEARIE Group

Manager, Finance & Insurance **Sep 2007-May 2008**

(MEARIE Group provides P&C, Credit, D&O, Liability insurance and financial services for Ontario's energy sector)

- Completed reporting on all lines of business for CEO, VP, tracked profitability-sales and market share. Identified and provided in depth analysis on key drivers for business performance.
- Conducted economic, market research and identified financial opportunities for the Ontario Energy Industry. Structured investment banking activities as required by Ontario's Energy Industry. Consulted and advised senior management about opportunities and threats associated with the energy sector's financial risk.
- Advised the VP Finance and CEO on financial / insurance solutions that benefited the energy industry. Launched and managed new solutions. Responsible for compliance and regulatory filings of insurance portfolio with OSFI,OIC.
- Was responsible for: annual-quarterly capital budgeting, planning /forecasts, month end activity implementing revenue enhancing and cost saving initiatives.

RECENT WORK EXPERIENCE *Continued*

MEARIE Group

Manager, Finance & Insurance **Sep 2007-May 2008**

- Also, completed conclusive study on financial performance of Energy Industry Firms in Ontario, presented findings and proposed solutions to CFO's and CEO's of Energy Organizations at the annual Utility Performance Management Survey Seminar held fall 2007.

Manulife Financial

Team Lead Financial Analyst, Group Benefit-Distribution **May 2006- Sep 2007**

- Supported senior management with forecasting, planning and projection activities. Participated in strategy development aimed to minimize risk exposure and fulfill plan member's best interest.
- Projected & Tracked sales (350 Mill) and profitability of group benefit plans based on asset mix and performance compared to claims on LTD, AD&D, Dental and other.
- Built financial models, prepared sales scenarios, compensation estimates and expense planning. Completed various industry reports (LIMRA).
- Developed, monitored and controlled budgets (60-70 Mill). Full year/QTLY forecasts for over 20 work areas across Canada.
- Undertook ad hoc Expense Management and variance analysis/reporting for VP Group Benefits Distribution.
- Lead projects on Performance to Plan/Budget resource allocation and implemented nation wide savings initiatives.
- Rebalanced the Group Benefits Budget by eliminating superfluous spending among 20 work areas, which led to 0.4 Mill in savings through 2006. Post acquisition synergy project.

Pitney Bowes

Financial Analyst, Sales –Corporate Finance Department **Oct 2005- Apr 2006**

- Managed projects within Finance and Sales, related to win business deals through private & Government tender response across Canada and the US.
- Formulated the P&L Profit and Loss worksheets, provided pricing analysis as per tender response strategy. Supported the sales and service teams in winning new market share.
- Structured customized financing through P&L and enrolled clients with Pitney Bowes Global Financial Services.
- Estimated total revenues for proposed projects through scenario analysis, consumables consumption volumes.
- Maintained all LOBs lines of business competitive within each segment through utilization analysis. Minimized costs through streamlined solutions to enhance overall value added.

ADP Inc.

Bilingual Financial Services Coordinator, Banking-Financial Services **Dec 2003- Oct 2005**

- Performed credit analysis and established client funding requirements for the purpose of facilitating: debit transactions, US wire payments, EFT debits, tax remittances and payroll. Provided accurate account statements and balanced transactions daily.
- Consulted with clients regarding Federal and Provincial Tax Remittances. Analyzed clients' tax accounts and provided solutions such as tax adjustments-credits or debit balances/ reconciliation.
- Advised clients on General Ledger updates and balancing. Implemented the requirements for managing Canada Savings Bond contributions, stop cheques, cheque copies, deposit recalls and banking traces in accordance with banking deadlines ADP and CPA (Canadian Payments Association) guidelines.
- Managed numerous emergency banking situations (e.g. hot payrolls or manual recalls).
- I Received recognition for the outmost creative contributions towards the merger of Finance and Tax services teams within the ADP Employer Services Group in Oct 2004.

Toronto Airport

Terminal Operations Specialist **June 2000- Nov 2003**

LANGUAGES

Fluent in Italian, intermediate French & Spanish. Citizen of Canada, USA and EU.