

Ryan Barker

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EDUCATION

Stony Brook University – Stony Brook, New York

May 2027

B.S. Honours Business Management – Honours Finance, Applied Mathematics & Statistics

3.62 GPA • CAA Commissioners High Honor Roll • Dean's List

Student-Athlete NCAA Division I Varsity Lacrosse Team

Relevant Coursework – Mergers & Acquisitions, Financial Management*, Financial Analysis with AI & Excel, Principles of Finance, Financial Accounting, Applied Combinatorics, Applied Linear Algebra, Graph Theory

EXPERIENCE

CI Financial (Assante Wealth Management) – Mississauga, Ontario

June 2026

Summer Analyst

- Build comprehensive financial plans and cash flow models for high-net-worth clients, focusing on tax-efficient wealth transfer and retirement indexing.
- Conduct due diligence on asset classes and third-party managers to optimize portfolio allocation and ensure alignment with client risk profiles.
- Prepare quarterly investment reviews and committee materials, translating market data into strong insights.

CFA Institute Research Challenge – New York, NY

September 2025 – February 2026

Financial Research

- Member of Stony Brook's undergraduate team; conducted in-depth equity research, including financial modeling, Excel valuation analysis, and investment thesis development, placing in the top five of the New York regional competition.
- Delivered persuasive oral and PowerPoint visual presentations to CFA Charter holders and industry professionals, communicating investment recommendations, key findings, and ethical considerations.

Bell Canada – Oakville, Ontario

May 2025 – August 2025

Sales Associate

- Created tailored mobility and residential solutions aligning plans with individual and business needs
- Consistently outperformed sales targets, achieving recognition as a top performer in location and broader region
- Supported customers with new activations, hardware upgrades, and complex account modifications

AWARDS + INVOLVEMENT

- Stony Brook University NCAA Division I Men's Lacrosse Team
- CFA Institute Research Challenge New York Finalist
- CAA Commissioners Honour Roll, High Honours Distinction

SKILLS

- **Leadership** – Captained high school and major junior lacrosse teams
- **Communication & Collaboration** – Effective communicator, experience working in teams and small groups
- **Microsoft Office** – Proficient in Microsoft 365 including Excel, PowerPoint, and Word
- **Artificial Intelligence** – Experienced in leveraging A.I. tools including Claude, Copilot, Gemini, etc.

INTERESTS

- Golf, Chess, Advanced Sports Analytics & Statistics, Skiing, Poker, Sports Cards