### First and Last Name, CFA

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# PROFESSIONAL SUMMARY

PORTFOLIO MANAGER

* Proficient in Fixed Income Asset Management with exposure to both and buy and sell side
* Provide Senior Administrative Leadership to Fixed Income Portfolio team
* Coaching and mentoring of junior portfolio managers, credit analysts and money market traders
* Perform Active Portfolio Management by trading domestic and international government and corporate bonds, derivatives and foreign exchange
* Winner of Morningstar’s Fixed Income Team of the Year-20xx and Best Fixed Income Fund of the Year-20xx

# CAREER EXPERIENCE

#### Company Name 20XX – 20XX

## Vice President & Director, Fixed Income Portfolio Manager

Senior portfolio manager of Canada Fixed Income Total Return retail and institutional funds ($30billion) with a mandate to maximize investment return on a risk adjusted basis.

* Performed active fixed income management of Institutional and Retail portfolios, including mandates for insurance, corporate, pension, and union clients as well as Mutual funds.
* Managed fixed income portfolios pursuant to maximize returns on a risk adjusted basis while strictly complying to portfolio investment constraints and policy.
* Determined relative value in the bond market by analyzing macro-economic conditions in relation to the capital markets and establish an appropriate risk/return investment strategy.
* Analysed current bond market levels, yield curve position and credit conditions to determine best opportunity to implement duration, curve and credit strategy in relation to market view.
* Traded bonds, derivative products and currency at the best possible price according to market expectations to implement investment strategy developed from market view.
* Monitored global market, macro-economic, geopolitical and business developments to determine their impact on the capital markets and future market direction.
* Member of Fixed Income Strategic Investment Committee which develops macro investment strategy to determine and implement allocation of global and domestic assets.
* Met with credit analysts to determine fundamental quality of domestic and international credit and relative value of domestic spreads versus US and CDS markets.
* Conferred and strategized with equity portfolio managers to determine macro direction in global capital markets and reposition balanced portfolios according to market view.
* Increased assets under management by participating in marketing presentations of asset management fixed income capabilities to prospective institutional and retail accounts and consultants.
* Prepared and presented quarterly performance, economic updates and bond market reviews for senior management of institutional funds under management.
* Conversed with various investment dealers to receive updates on market developments, trading insights and positioning.
* Attended economic, market and professional seminars hosted by investment dealers, CFA and academic organizations to increase body of industry knowledge and skill.

#### Company Name 20xx – 20xx

## Vice President & Director, Fixed Income Portfolio Manager

Senior Portfolio Manager of Investors Canada Fixed Income Total Return and Insurance funds ($6billion) with a mandate to maximize investment return on a risk adjusted basis.

* Determined relative value in the bond market by analyzing macro economic conditions in relation to the capital markets and establish an appropriate risk/return investment strategy.
* Analysed current bond market levels, yield curve position and credit conditions to determine best opportunity to implement duration, curve and credit strategy in relation to market view.
* Traded bonds, derivative products and currency at the best possible price according to market expectations, to implement investment strategy developed from market view.
* Met with Aviva credit analysts to determine fundamental quality of domestic and international credit and relative value of domestic spreads versus US and CDS markets.
* Increased assets under management by participating in marketing presentations of Aviva Investors Global Funds and advisory capabilities to institutional accounts and consultants.

#### Company Name 20XX – 20XX

## Fixed Income Portfolio Manager

Managed Investment Counsel Total Return bond funds ($6billion).

* Determined relative value in the bond market by analyzing macro economic conditions in relation to the capital markets and established an appropriate risk/return investment strategy.
* Analyzed current bond market levels, yield curve position and credit conditions to determine best opportunity to implement duration, curve and credit strategy in relation to market view.
* Traded bonds, derivatives and currency at the best possible price according to market expectations, to implement investment strategy developed from market view.
* Met with credit analysts to discuss condition of specific issuers and sectors to determine credit quality and relative value of domestic spreads and CDS in the market.
* Increased assets under management by participating in marketing presentations to institutional accounts, consultants and high net worth individuals.
* Met with domestic and international equity portfolio managers to discuss macro and micro direction in global capital markets.
* Traded relative value in the bond market by manipulating duration, yield curve and credit.

#### Company Name 20XX – 20XX

## Assistant Vice President, Bonds & Treasury

Managed Financial Surplus and International Total Return bond portfolios ($7 billon).

* Determined relative value in the bond market by analyzing macro economic conditions in relation to the capital markets and establishing an appropriate risk/return investment strategy.
* Traded bonds, options, swaps and currency at the best possible price according to market expectations, to implement duration, curve and credit strategy developed from market view.
* Met with Credit Analysts to discuss current conditions of specific issuers and sectors, determining credit quality and relative value to domestic spreads in the market.

Fixed Income Portfolio Manager,

Institutional Bond Desk – Sales & Trading

Institutional Bond Desk - Sales & Trading

# EDUCATION & PROFESSIONAL DEVELOPMENT

Investment Management Workshop, CFA 2XXX

* Harvard Business School, Boston, Massachusetts, USA.

Chartered Financial Analyst Designation 2XXX

* CFA Institute, Toronto, ON

Canadian Securities, Futures, Options 2XXX

* Canadian Securities Institute, Toronto, ON

Bachelor of Arts in Economics 2XXX

* University of Western Ontario, London, ON