

Edouard Lam, BCom

206-10 rue St-Jacques Montréal, QC H2Y 1L3 | (514) 236-1734 | edouardlam2024@gmail.com | edouardlam.com

SUMMARY OF SKILLS AND QUALIFICATIONS

Investment professional with 5 years in banking, and client strategy. Recognized nationally for exceeding KPIs.

Core Competencies: Leadership, strategic problem-solving, data-driven decision making, attention to detail, organizational skills, effective teamwork and communication, and knowledge of organizational behavior.

Technical skills: Data visualization, market research, CRM management, business frameworks and valuation, and financial advisory.

Technology: Microsoft Office, Power BI, Salesforce, artificial intelligence, and UI/UX design.

Languages: French (native), English (fluent, C2), Spanish (elementary, A2), Russian (elementary, A2).

EDUCATION AND CERTIFICATIONS

BCom – Concordia University, Finance 2020 – 2025

Canadian Securities Course (CSC®) – Canadian Securities Institute Jan 2024

PROFESSIONAL EXPERIENCE

Senior Investment & Personal Banking Specialist – Scotiabank Sept 2025 – Jan 2025
Montreal – Quebec, Canada Feb 2025 – Now (Second location)

- Proactively managed a portfolio of nearly 500 clients and identified growth opportunities.
- Delivered integrated investment and banking strategies, optimizing outcomes for mid-affluent to affluent clients in collaboration with Wealth Management to enhance customer retention.
- Leveraged visualization tools and analytics to track client performance and optimize their outcomes.

Manager, Personal Financial Services – TD Canada Trust July 2025 – Aug 2025
Montreal – Quebec, Canada

- Consistently exceeded national targets, resulting in two consecutive TD Legends Awards (above 200% of personal KPIs).
- Led client needs assessments, provided tailored financial solutions, recommended asset allocation strategies, and used data to correct portfolio inefficiencies.
- Improved efficiency and client turnaround times by aligning sales processes with operational best practices.

Personal Banking Associate – TD Canada Trust May 2022 – Aug 2025
Montreal – Quebec, Canada

- Collaborated with product teams and credit analysts to ensure effective cross-functional teamwork.
- Understood customer needs and guided them through tailored solutions.
- Led an incentive to attract more Canadian newcomers through financial education and outreach.

LEADERSHIP EXPERIENCE AND EXTRACURRICULARS

ZenPyro (Digital Marketing and SaaS Consulting) - Cofounder March 2026 – Present
<https://zenpyro.com>

Russian Language - Школа Грамота (Gramota School) 2025

Campaign Volunteer – National Political Campaign, Canada 2024 – 2025

Founder - eLab Media, Digital Marketing Consulting 2020 – 2024

Social Chair - GLC Concordia 2019 – 2020

Vice-President - Mu Omicron Zeta Fraternity

2020 – 2021

Student and Social Outreach – TD Canada Trust

- Assisted international students at McGill events to better understand the Canadian financial system. Guided asylum seekers in setting up their bank accounts.

PROFESSIONAL AWARDS

Legends Award for fiscal year (two consecutive years) – TD Canada Trust

Feb 2024 – 2025

Scottsdale – Arizona, USA (Feb 2025), Hollywood – Florida, USA (Feb 2024)

- Recognized for 231% KPI achievement; presented by executives in Scottsdale (2025) and Hollywood (2024).
- Designed a KPI tracking dashboard to help colleagues overperform by a large margin.

INTERESTS

Public Speaking, Global Affairs, App Development, Fintech, AI Automation, Fitness, Classical Music