

JAMES LEWIS

St. John's, NL A1A4W2 | (709)749 0556 | jrlewis@mun.ca

Education

Memorial University of Newfoundland - St John's, NL Expected in 04/2024
● Bachelor of Commerce in Finance, Minor in History

High School Diploma 06/2019
Holy Heart of Mary Regional High - St. John's, NL
● French Immersion Designation

Work History and Experience

Internal Auditor Co-op 01/2022 to 04/2022
Government of Newfoundland and Labrador, Executive Council – St. John's, NL

- Received and processed hundreds of invoices, converting paper documents into digital records transferred to Oracle for further payment
- Reconciled problematic government accounts against historic records using Oracle's FMS, discovering variations between service provider statements and government payments
- Analysed corporate credit card reconciliations, ensuring employee compliance with government regulations and internal controls as set in the Financial Administration Act, Public Procurement Act, and other relevant legislation governing the use of corporate credit card use
- Reviewed financial delegation requests, noting irregularities and inconsistencies for revision

Marketing Analyst 04/2020 to 08/2020
ClearRisk Inc. – St. John's, NL

- Researched emerging markets in the insurance industry in search of new growth opportunities for the company, assessing opportunities based on collected data
- Collected and inputted contact information of target demographics into Salesforce in preparation of large scale marketing campaigns
- Managed customer information in Salesforce, organising contacts by company and industry in order to coordinate customer outreach

Supply Chain Support

ExxonMobil - St. John's, NL 05/2023 to 09/2023
● Used SAP to analyse thousands of material movements across dozens of warehouses and facilities
● Reconciled inventory reports to resolve discrepancies in preparation for inventory counts
● Headed an initiative to reduce inventory on hand through the use of SAP
● Ensured compliance of company controls for material disposals and write-offs

Sector Manager 09/2021 to Current
The Fund – St. John's, NL

- Student run, value based portfolio at Memorial University worth \$270 000 (CAD)
- Evaluate companies using a discounted cash flow model, WACC sensitivity analysis, and an emphasis on sustainable investing, using ESG guidelines
- Use Bloomberg Terminals for research and collection of financial data
- Create financial models in excel, use collected data to model 5 year financial forecasts based on investment theses and assumptions
- Develop a pitch for a selected stock, presenting gathered information and financial forecast to peers and portfolio managers

Awards and Certifications

- Exxonmobil Higher Education Award- \$20 000 over 5 year
- Newfoundland Power Employee Association Scholarship
- Memorial University of Newfoundland Entrance Scholarship
- Marquee Group Discounted Cash Flow Modelling and Financial Statements
- Bloomberg Market Concepts

References

Reference 1:

Name: Ann Winsor
Organisation: Executive Council, Provincial Government of Newfoundland and Labrador
Title: Accounting Policy Analyst
Email address: Annwinsor@gov.nl.ca
Phone: (709) 729-6132

Reference 2:

Name: Jeff Burt
Organisation: BMO Nesbitt Burns
Title: Senior Vice President, Wealth Advisor
Email address: jeff.burt@nbpcd.com
Phone: (709) 631-2381

Reference 3:

Name: Maggie Smith
Organisation: Mysa Smart Thermostats
Title: Regional Sales Lead
Email address: Maggie@getmysa.com
Phone: 1(888) 803-6972 ext: 852