



## Jeffrey Roy CPA, CA

**Passionate about helping businesses grow through innovation, connecting like-minded individuals and working with data to provide novel insights.**

Experienced, hands-on & data centric Chartered Accountant with deep and diverse accounting experience. Comfortable working with all levels of an organization to achieve success and exceed client expectations. A coach and leader that inspires others to think strategically.

### **SELECTED ACHIEVEMENTS**

- Established a comprehensive financial management and reporting system – including procedures, policies and internal controls
- Prepared monthly financial statements and draft year-end statements (including working papers) for annual audit
- Budgeting and cash flow management for a start-up/fast growing enterprise
- Updated, reviewed and improved senior management KPI reports including the development of new metrics; Drafted commentary for Senior Management when presenting results to external stakeholders
- Coordinate tax filings with external auditors
- Review and advise on completeness and adequacy of compliance systems
- Review and overhaul marketing systems and priorities (including digital branding and social media presence);
- Prepare and monitor comprehensive business development plan and effective growth strategies including product review and new product launches;
- Actively drive business development opportunities that expand client assets under management and brand awareness in the investment community by developing material for social media and other advertising mediums

### **PRIOR EXPERIENCE**

- The Osborne Group
  - Broadview Software
- Vulcan Investments Management Corp – Interim/Part Time Vice President – Finance/CFO
- Manulife Finance Corporation – Director, Chief Data Office; Director, Financial Planning & Analysis; Director, Middle Office Operations; Director, Investment Strategy

### **QUALIFICATIONS**

- Canadian Institute of Chartered Accountants
- Enterprise Risk Management – CPA Ontario
- Strategic Analytics – CPA Ontario
- Partners, Director & Officers Course – Canadian Securities Institute
- International Financial Reporting Standards Certificate – American Institute of Chartered Professional Accountants - US

