

DEVANSH THAPAR

FINANCE INTERN - Financial Analysis, Financial Planning, Excel Modeling

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📍 Ontario

in [LinkedIn](#)

PROFESSIONAL SUMMARY

Finance professional with experience in financial analysis, budgeting, forecasting & variance analysis supported by Excel-based financial modeling & data analytics, with capability in market research, macroeconomic analysis, valuation screening & equity watchlist development. Experienced in client risk assessment, portfolio suitability analysis & financial planning across retail banking & household advisory scenarios supporting analysis for 25+ evaluated securities.

SKILLS

- **Financial Analysis:** Financial statement analysis, valuation models, budgeting, forecasting, variance analysis.
- **Data Analytics:** SQL basic querying, Excel financial modeling, Power BI dashboards, Tableau reporting.
- **Market Research:** Industry analysis, peer benchmarking, macroeconomic indicators, equity and credit markets.
- **Risk Analysis:** Client risk assessment, risk tolerance calculation, exposure analysis, sensitivity scenarios.
- **Productivity Platforms:** Office 365 Suite, Google Workspace, data reporting, and financial documentation.

WORK EXPERIENCE

Merchandising Representative

April 2025 – Present

The Brick

Ontario

- Resolved daily customer cases via internal order systems, troubleshooting billing, delivery, and inventory discrepancies, reducing unresolved tickets by 18%, maintaining accurate transaction records and escalation tracking.
- Executed 30+ weekly follow-ups while maintaining order documentation and inventory logs, improving fulfillment accuracy and generating daily and weekly operational reports for issue tracking and workflow monitoring.

Executive Committee Member

August 2025 – Present

GBC Investments Club

Ontario

- Delivered weekly macroeconomic market briefings analyzing rates, inflation, and equity movements, improving member market comprehension by 20% via interpretation of volatility drivers and global financial news impacts.
- Designed a weekly equity watchlist using macro themes and valuation screens, producing one-page investment briefs covering catalysts and risks, enabling 25+ members to evaluate securities using analytical frameworks.

PROJECTS

Senior Personal Banker – BOPPPS Mini-Lesson

Academic Project

- Structured a BOPPPS-based instructional framework covering consumer behaviour and retail banking advisory flows, aligning lesson outcomes with 5 decision stages to support client-facing financial planning instruction.
- Developed segmentation and client profiling models using demographic, psychographic, and behavioural variables, mapping advisory actions to each decision phase while evaluating RRSP, TFSA, GIC, & equity alternatives.

Macroeconomic Indicators and Consumer Behaviour

Academic Research Project

- Authored 1 research & analysis explaining how leading indicators forecast economic cycles, translating macroeconomic signals into consumer-level financial implications across spending, borrowing, & confidence trends.
- Analyzed five indicators including equity markets, housing starts, yield curve, commodities, and orders data, constructing a structured framework linking indicator movement to inflation pressure and lending conditions.

Aman & Priya Financial Planning Case

Case Study Project

- Examined a dual-income household case evaluating cash flow, savings gaps, and goal prioritization on 4 objectives including emergency funds, housing, education, and retirement planning horizons using structured analysis.
- Computed risk capacity and tolerance metrics while integrating behavioural finance biases, constructing asset allocation, RESP optimization, insurance needs analysis, and rebalancing strategies using suitability principles.

EDUCATION

Advanced Diploma in Business Administration – Finance

January 2025 – August 2027

George Brown College, Ontario

CERTIFICATIONS & ACCOMPLISHMENTS

- **Foundations in Financial Modeling** – Financial Modeling Institute (FMI)
- **The Complete Financial Analyst Course 2025** – Udemy
- **Financial Modeling and Forecasting Financial Statements**
- **Financial Markets** – Yale University
- **Customer Service Operations** – LinkedIn Learning
- **Dean's Honour List** – Winter 2025 (Term GPA 3.5+), George Brown College