

Chaeun Lee

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Education

Bachelor of Chemical Engineering

McGill University (Montreal, Quebec)

- CGPA: 3.87/4.00 | Dean's Honour List | Graduated with Distinction
- Class of 1983 Scholarship (Academia), TEAM Award (×6, Academia), SURE International Award (Research)
- Class Representative in junior and senior year
- Teaching Assistant for seven math and chemistry courses

Passed CFA Level 1 (Feb 2026 Exam)

Professional Experience

TD Bank Group, TD Wealth (Toronto, Canada)

Strategy Data Analyst

Apr 2025 - Present

- Design and automate pricing and clawback workflows, replacing manual processes and reducing annual costs by \$8.9MM
- Lead data-driven pricing initiatives across wealth investment products, supporting fee optimization and product structuring decisions for advisory platforms
- Generate customer and market insights using internal transaction, pricing, and client data alongside external benchmarks to identify trends, pricing gaps, and optimization opportunities for investment advisors

Fitch Group, Fitch Solutions - Sustainable Fitch (Toronto, Canada)

Associate Analyst/Analyst

Sep 2023 - Apr 2025

- **Promoted from Associate Analyst to Analyst in Oct 2024**
- Managed a portfolio of 200+ companies in chemicals, health care, technology, industrials, oil and gas, manufacturing, mining, energy, and real estate, providing insights relevant to fixed income portfolios for private debt investors
- Authored ESG research reports for collateralized loan obligations (CLO) using corporate disclosures and filings
- Conducted peer benchmarking and sector analysis to ICMA principles and EU taxonomy requirements
- Assessed and reviewed green, social, sustainable, and sustainability-linked debt frameworks and live financing transactions

Find a Pattern, Inc.

Board Member

Jul 2023 - Present

- Advise on monetization strategy and operational scale-up for a digital directory platform focused on maximizing advertising revenue through SEO-driven customer acquisition
- Partner with the executive team on KPI development and marketing spend optimization, product strategy, and investor relations to drive sustainable growth and funding readiness

Financial Data Analyst/Senior Financial Analyst

Jan 2023 - Sep 2023

- **Promoted from Financial Data Analyst to Senior Financial Analyst in Jan 2023**
- Analyzed client demand trends and marketing performance to drive revenue growth and inform business strategy decisions
- Built financial forecasts, budgets, and performance reports to support strategic planning and evaluate performance against key KPIs (e.g., ROI)
- Developed automated dashboards and reporting systems to improve data accuracy, and streamline decision-making

Summer Intern

May 2020 - Aug 2020

- Extracted advertisement data and statistical reports using Excel to publish weekly summaries for executive officers
- Generated a 9% revenue increase through proactive client outreach and new advertising contracts

Projects

Invest with Chaeun (www.investwithchaeun.com)

May 2025 - Present

- Build and manage a personal finance platform focused on investors in Canada for over 5000 retail investors
- Conduct independent research on equities, ETFs, and macroeconomic trends, performing fundamental and quantitative analysis, developing investment theses and tracking market developments

Skills

Technical Skills: Real Estate Financial Modelling, Financial Forecasting, Scenario & Sensitivity Analysis

Programming/Software: Microsoft Office Suite (Excel, Word, PowerPoint), Python, MatLab, Alteryx, ISM, Croesus

Languages: English (Native), Korean (Native), French (Intermediate)