

Piotr Rajca

CFA, CIPM, PRM, FCSI, CIM, CBP



HIGHLIGHTS

- Registered as an Advising Representative - Portfolio Manager in every Canadian province.
- Author of over 100 articles on my own financial education website.
- Very interested and informed about current investment trends; factor investing, cryptocurrencies, blockchain, artificial intelligence, fintechs, socially responsible investing, robo-advisors, etc.

CONTACT ME

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-  Montreal, Quebec

WORK EXPERIENCE

NATIONAL BANK
March 2016 - Present

PRODUCT OFFICER - NATIONAL BANK INVESTMENTS

Be the team's expert for specified products by sharing insights and expertise, gather and analyze data and business intelligence, assess market competition and ensure effective communication with internal and external partners.

Support the team in managing the investment universe and the models offered in the UMA program by leveraging the organization's expertise for the benefit of National Bank Financial advisors and their clients.

NATIONAL BANK
Aug 2012 - March 2016

ACCOUNT MANAGER - PRIVATE INVESTMENT MANAGEMENT

Private Investment Management specialist for high-net-worth clients and for the network of National Bank financial planners.

NATIONAL BANK
Nov 2008 - Aug 2012

INVESTMENT AGENT - NATIONAL BANK SECURITIES

Advise clients on the proper investment products considering their objectives/risk tolerance, make sure that client accounts are compliant with regulation and educate clients on concepts such as monthly distributions, diversification and recent returns.

OTHER PROFESSIONAL ACTIVITIES

EDUCATIONFINANCE.CA
July 2014 - Present

OWNER / AUTHOR

Creation and management of the financial education website <http://www.educationfinance.ca>
More than 100 articles published and 20 000 page views per month.

CONDO ASSOCIATION
Sept 2014 - Present

MEMBER OF THE BOARD OF DIRECTORS

Administrator of the syndicate of co-owners for a 64-unit building.

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LANGUAGES

• FRENCH

• ENGLISH

• POLISH

• SPANISH



EDUCATION

- CFA INSTITUTE**
2014-2015
- CFA AND CIPM DESIGNATIONS**
I obtained the right to use the Chartered Financial Analyst (CFA) designation by passing all three required examinations and by having my work experience approved (August 2015).
Certificate in Investment Performance Measurement (CIPM) designation granted after passing both required examinations and by having my work experience approved (January 2014).
- RJCCQ**
2015
- TRAINING PROGRAM – ADMINISTRATORS OF THE FUTURE**
Training program focused on corporate governance and on the duties/responsibilities of the Board of Directors. Certificate received from Collège des administrateurs de sociétés de l'Université Laval.
- JCCM**
2014
- RÉSEAU JEUNES LEADERS**
Leadership training program offered by the Jeune Chambre de Commerce de Montreal that included six training sessions, with each one targeting a different aspect of leadership.
- CSI**
2016
- FELLOW OF CSI (FCSI) DESIGNATION**
Passed all the necessary courses and completed the 7 year financial services work experience requirement to receive the FCSI designation from the Canadian Securities Institute (February 2016).
- PRMIA**
2013
- PRM DESIGNATION – PROFESSIONAL RISK MANAGER**
I obtained the right to use the PRM designation offered by the Professional Risk Managers' International Association by passing all 4 required examinations (June 2013).
- CSI**
2008-2014
- OVER 15 COMPLETED COURSES WITH THE CANADIAN SECURITIES INSTITUTE, NOTABLY:**
Canadian Securities Course (2008) Futures Licensing Course (2011)
Options Licensing Course (2011) Trader Training Course (2013)
Technical Analysis Course (2013) Portfolio Management Techniques (2012)
- CSI**
2008-2014
- OTHER CERTIFICATES WITH THE CANADIAN SECURITIES INSTITUTE**
Certificate in Derivative Market Strategies (2013) Certificate in Financial Planning (2009)
Certificate in Equity Trading and Sales (2013) Certificate in Advanced Investment Advice (2012)
Certificate in Fixed Income Trading and Sales (2013) Certified Investment Manager (CIM) (2012)
- GARP**
2013
- FINANCIAL RISK MANAGER (FRM) DESIGNATION**
Passed the FRM Part I Exam given by the Global Association of Risk Professionals (GARP).
- HEC MONTRÉAL**
2006-2008
- BACHELORS DEGREE IN BUSINESS ADMINISTRATION B.A**
- COLLÈGE MAISONNEUVE**
2003-2005
- DIPLOMA OF COLLEGE STUDIES D.C.S. BUSINESS ADMINISTRATION**

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OTHER ACHIEVEMENTS AND SKILLS

- Passed the Bloomberg Markets Concepts course (August 2015)
- Obtained the Certified Bitcoin Professional (CBP) designation from the CryptoCurrency Certification Consortium (February 2018)
- Very proficient with investment management software (Morningstar Direct / FactSet / Croesus / Bloomberg)