

Venture investor with 7+ years of experience operating with high agency in lean teams to execute over \$1B of complex transactions and build commercial efficiencies. I have led the deployment and adoption of AI tools and workflows at my fund, and I build and ship personal tools with AI agents in my spare time.

Experience

Columbia Lake Partners | London, UK

Investment Associate | Jan'25 – Present

- Turn company, customer, and market data into structured operating views, KPI frameworks, and decision-ready memos for high-stakes investment decisions.
- Deeply evaluate unit economics, pricing, gross margins, GTM quality, and customer value drivers to understand how companies scale and where commercial risk sits.
- Build, deploy, and iterate AI workflows with reusable skills and a fund context layer across diligence, analysis, memos, and portfolio monitoring to increase efficiency and quality.
- Build trusted relationships across the startups ecosystem by working directly with founders, C-suite, and VCs to understand business priorities and enable them to reach their next milestone.

AGN Capital | Remote

Founder | Oct'23 – Oct'24

- Founded an advisory business, built my own book of clients, managed 30+ institutional lending relationships, and funded \$20m in transaction volume.
- Advised founders on how to structure equity and debt investments to acquire and build complex projects.

Realtech Capital Group | Vancouver, BC

Associate | 2020 – Sep'23

- Led 70+ complex debt transactions totaling ~\$1B of deal volume from origination to closing, coordinating with multiple stakeholders.
- Managed 25+ client relationships as primary lead; negotiated with investors to get competitive terms and repeat mandates.
- Advised clients on capital structure decisions by analyzing project economics, market conditions, and risks.

Analyst | Aug'18 – 2020

- Built leveraged cash flow models and wrote credit memos for third-party investor approvals to streamline underwriting and decision-making.
- Researched target markets to identify prospects, led outreach and converted cold calls into mandates representing \$1M+ of revenue.

Projects & Accomplishments

Fund-wide AI Enablement

Led the AI rollout at Columbia Lake Partners, ensuring adoption fund-wide. Built repeatable workflows/skills and fund context layer to apply across investment diligence, analysis, memos and portfolio monitoring. Increased deal flow capacity by 50%, and roughly 6+ hours saved per person per week.

Personal AI Systems & Prototypes

- Stock Portfolio OS to manage public stock research and investments.
- iOS Journal App using LLMs to engage users for high quality inputs based on user context.
- Personal 2nd brain, ingesting content, managing goals and projects, and storing personal context to improve output and efficiency of AI agents.

Job Tracking OS

Built a private Jack & Jill: database backed dashboard plus agentic automations to search for relevant roles and contacts at target companies.

Additional Tools

- [Personal website](#) with Supabase for content storage
- [Retirement planner](#) with Python & LLM API
- MacOS dictation app (Wisprrflow) with voice API
- [Expense splitter](#) (Splitwise)
- [Flight tracker](#)
- Automated and personalised company news tracker

Education	Queen’s University, Bachelor of Commerce Kingston, ON 2014 – 2018
Core Skills	Strategy, financial modeling, unit economics and customer analysis, KPI design and tracking, AI workflow design, Codex, Claude Code, commercial diligence, clear executive level writing, relationship management, sales, and presentation to senior decision makers.