

# SHAWN TYDLASKA, CFP®

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**CERTIFIED FINANCIAL PLANNER (CFP®)** with six years of experience in the financial services industry, most recently with the financial planning firm Blankinship & Foster, LLC. Experience with financial planning statements and identifying financial planning needs of clients. Expertise in corporate actions, risk analysis, and equity asset validation. Possess strong financial market knowledge; ensure that all corporate action instructions align with fiduciary objectives and client directives. Counsel pricing group on establishing asset pricing methodology as a result of corporate actions. Build and cultivate long-lasting partnerships with data vendors, custodian banks, and stock exchanges. Implement measures to streamline processes and improve operational effectiveness. Exhibit excellent leadership skills; direct three team members in validating and auditing reference and corporate action data for over 15,000 assets. Managed audit control process, including SAS 70; ensured that audits were properly executed. Hold BA in Economics. Career highlights include:

- Enhanced audit process, expanding market cap data across both owned and unowned assets.
- Instituted procedure to efficiently audit and upload vendor data.
- Selected for three-month assignment in London, England, to train newly hired associates on corporate action research techniques, critical reasoning skill development, and tools needed to maintain data integrity.

## PROFESSIONAL EXPERIENCE

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Blankinship & Foster, LLC, Solana Beach, CA

June 2010–Present

### Summer Internship

Assist financial planners in preparing for client review and initial client meetings. Prepare balance sheet, statement of cash flow, beneficiary designation summary, insurance review summary, durable power of attorney summary, estate planning summary, and client thumbnail summary worksheet. Identify potential financial planning needs ahead of client meetings. Familiar with Junxure and Portfolio Center software programs.

GRANTHAM, MAYO, VAN OTTERLOO & CO. LLC (GMO LLC), Boston, MA

2008–May 2010

### Corporate Actions and Proxy Analyst

Notify and advise portfolio managers on voluntary and mandatory corporate actions, including tender offers, Dutch auctions, rights issues, and merger elections. Advise 20+ custodian banks and prime brokers on portfolio manager's investment decisions. Reconcile cost allocation between accounting division and custodian banks, ensuring accurate cost basis. Review trades while monitoring corporate action and proxy activity to prevent shares from being blocked from trading. Track equity securities for more than 300 institutional accounts, mutual funds, and separately managed accounts. Ensure proxy voting aligns with both client and GMO's custom voting policies.

CAPITAL GROUP COMPANIES (CGC), Los Angeles, CA

2004–2008

### Global Securities Analyst, 2007–2008

Managed, reviewed, and approved corporate actions and asset setups processed by junior associates. Validated corporate action terms critical in striking daily mutual fund net asset value (NAV) prices. Facilitated urgent compliance-related meetings, conducted procedure audits, and documented internal compliance issues as Operational Risk Assessment (ORA) team liaison.

### Global Securities Associate Level 2, 2005–2007

Researched and input new assets into internal database, including IPO securities, convertible assets, units, indices, warrants, and depository receipts; utilized various accounting/reporting databases. Analyzed outstanding share vendors.

### Global Securities Associate Level 1, 2004–2005

Processed all corporate action events, including dividends, mergers, rights issues, tender offers, and stock splits.

MERRILL LYNCH & CO., INC., Century City, CA

Summer 2003

### Financial Analyst Intern

Researched corporate databases to identify companies seeking to renew their 401k plans.

### Financial Advisor Recruiter

Initiated recruiting process of financial advisors in California and Colorado regions. Contributed to recruiting financial advisor with assets in excess of \$800K.

## EDUCATION, LICENSURE, LEADERSHIP EXPERIENCE, & COMPUTER SKILLS

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Bachelor of Arts in Economics, minor in Education – UCLA, Los Angeles, CA. GPA: 3.42/4.0.

Certificate in Personal Financial Planning – UCLA Extension, Los Angeles, CA.

Previously served as Co-President of Harvard Business School Partners' Club. In addition, served as Video Coordinator for University of California, Los Angeles (UCLA) Intercollegiate Athletics Department and Camp Counselor/Water Ski Instructor with Camp Laurel in Readfield, Maine.

Proficiencies include Junxture; Portfolio Planner; Word; Excel; Microsoft Office Suite; Bloomberg; Reuters; Telekurs; DTCC; FT IDC/Remote Plus; Thomson One Analytics; CCH (Wolters Kluwer Law & Business); custodian bank applications; and proprietary software.