

# EVAN MERRILEES

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## PROFESSIONAL EXPERIENCE

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**Manager**, Strategy and Transactions, EY Bermuda Ltd., Hamilton, Bermuda **2023 - Present**

- Responsible for the management of various engagements, including transaction advisory and turnaround and restructuring projects including leading discussions with management and other advisors
- Ability to manage competing deadlines and priorities across multiple engagements, requiring excellent organizational and communication skills when interacting with clients and senior executives
- Identified potential issues or negotiation factors that could impact purchase price or transaction structuring and advised clients on how to negotiate key financial and business issues in a transaction or restructuring situation

**Manager**, Transaction Diligence, Strategy and Transactions, Ernst and Young LLP, Toronto **2023**

- Responsible for the management of financial due diligence engagements and relied on by clients to assist in their acquisition or sale of a target business including leading discussions with management and other advisors
- Ability to manage competing deadlines and priorities across multiple deals, requiring excellent organizational and communication skills when interacting with clients and senior executives
- Identified potential deal issues or negotiation factors that could impact purchase price or deal structuring and advised clients on how to negotiate key financial and business issues in a transaction

**Senior Associate**, Transaction Diligence, Strategy and Transactions, Ernst and Young LLP, Toronto **2022 – 2023**

- Responsible for the execution of financial due diligence engagements and relied on by clients to assist in their acquisition or sale of a target business including leading discussions with management and other advisors
- Identified potential deal issues or negotiation factors that could impact purchase price or deal structuring and advised clients on how to negotiate key financial and business issues in a transaction
- Analyzed financial and operational results of the target business to provide insights into the performance of the business and presented them in a concise manner that adds value to clients
- Ability to manage competing deadlines and priorities across multiple deals, requiring excellent organizational and communication skills when interacting with clients and managers

**Senior Accountant**, Financial Services Office, Audit, Ernst and Young LLP, Toronto **2021 – 2022**

- Managed client relationships to ensure that client expectations were met while looking for ways to add value to existing clients through additional service offerings
- Performed audit procedures over the most complex and high-risk areas of the audit, developed in-depth technical knowledge of financial instruments, capital markets and securitization
- Led the day-to-day execution of audits to ensure that overall team deadlines are met and that the team is functioning effectively, also led initiatives on team culture and onboarded new team members
- Responsible for coaching staff on the team to ensure they were developing the necessary skills while also managing staff to ensure their work was on track to meet deadlines and up to quality standards

**Staff Accountant**, Financial Services Office, Audit, Ernst and Young LLP, Toronto **2019 – 2021**

- Demonstrated ability to work in a fast-paced team environment while producing a high-quality work product and maintaining attention to detail, responsible for working on high risk and complex areas of audits
- Used data analysis tools to develop a deep understanding of clients' businesses which can be used to provide more valuable insights to clients and find ways to execute more efficient audits
- Executed audit procedures in accordance with Canadian Audit Standards to ensure that appropriate evidence was obtained to respond to audit risks, requiring in-depth knowledge of accounting standards
- Responsible for developing and maintaining client relationships and identifying ways to add value to clients

## EDUCATION

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**Chartered Professional Accountant (CPA)**, CPA Ontario **2022**

- CPA designation obtained in August 2022

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|---|--------------------|
| <b>Chartered Financial Analyst (CFA) Candidate</b> , CFA Institute  | <b>In progress</b> |
| <ul style="list-style-type: none"> <li>• Successfully wrote level 1 exam in 2021</li> </ul>   |                    |
| <b>Graduate Diploma in Accounting</b> , Smith School of Business, Queen's University, Kingston  | <b>2019</b>        |
| <ul style="list-style-type: none"> <li>• Achieved a 4.24 out of 4.3 GPA (A to A+)</li> </ul>  |                    |
| <b>Bachelor of Commerce</b> , Smith School of Business, Queen's University, Kingston  | <b>2019</b>        |
| <ul style="list-style-type: none"> <li>• Cumulative 4.14 out of 4.3 GPA (A to A+), achieved Dean's List with Distinction standing (top 10%) each year</li> <li>• Earned a Certificate in Social Impact, focusing on responsible business leadership</li> <li>• Academic exchange at ESCP Europe, Paris, France, Master in Management in winter term of 2017/2018 school year</li> </ul> |                    |

#### **ADDITIONAL INFORMATION**

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- Proficient with the use of Power BI and Alteryx data analytics tools
- Experienced in 3-statement and 13-week cashflow modelling across deals and restructuring engagements
- Completed discounted cash flow valuation workshop and financial modeling course
- Basic proficiency in Java and Python coding languages
- Passionate about investing and all aspects of personal finance
- Received the Thomas A. Marshall Scholarship and the Sutton Scholarship for Higher Education upon graduation, for academic excellence in management accounting and for pursuing higher education, respectively