

# David Wallace RGD

Toronto, ON | 416-534-1079  
[david.wallace183@gmail.com](mailto:david.wallace183@gmail.com)  
[www.linkedin.com/in/wallace183](http://www.linkedin.com/in/wallace183)  
[www.davidwallace183.com](http://www.davidwallace183.com)

---

## SKILLS

Salesforce Marketing Cloud/  
Content Builder, HTML5, CSS,  
email marketing, visual identity,  
print design, AODA, Figma,  
Workfront, Aprimo, Microsoft  
Office Suite, (PowerPoint, Excel,  
Word), Adobe Creative Suite,  
(Photoshop, Dreamweaver,  
InDesign, Illustrator, Adobe XD  
and Acrobat Pro).

# Designer, Creative & Digital Design

A highly skilled digital graphic designer at a top-tier financial services company. Demonstrates a strong work ethic and therefore has earned the trust of those he collaborates with. Calm under pressure and adapts to change. Can manage large tasks and multi-layered projects, is results-oriented, and is concerned about quality and ensuring projects are delivered on time and error-free.

---

## CAREER EVOLUTION

### Invesco Ltd.

1997-2020

*Senior Designer, Creative & Digital Design*

### Digital Email Marketing

- + Created emails for North America U.S./Canada in the Retail and Institutional markets using Salesforce Marketing Cloud/Content Builder to make sure every email created falls into a user-oriented email.
- + Contribute to conducting code reviews to ensure code quality was at the highest level possible and used Salesforce's proprietary coding language, AMPscript, to personalize emails, create cross-channel template layouts, and work with messaging functions on the Marketing Cloud platform.
- + Acquired the knowledge of coding to capture data on click rates to identify and track KPIs and other metrics to help improve lead generation and client engagement.

### Digital Monthly Fund Profiles

- + Project managed the automation of Canadian monthly fund profiles for both Series A and F, in English and French, and generated 356 PDFs on the 14th business day of each month, in conjunction with Global Distribution Services (GDS) staff.
- + It was common to have issues arise that needed resolution during each production cycle. Daily meetings were held to go over any change to the workflow process and staffing needs.
- + Kept the content log up-to-date with content changes, ensuring the fund profiles were delivered on time and error-free.

### Automation of Digital *Fundamentals* Magazine

- + In June 2014, the GDS project for *Fundamentals*, a monthly catalogue of fund performance figures, was officially approved.
- + Participated in the project charter and supplied valuable insights, identifying key data sources for the GDS team from the beginning to map out logistics; show/hide fragments in building the platform for the design, workflow, production process, data sources points and Excel files; and provided support and guidance on all other files.
- + Had weekly meetings for the automation process and parallel runs. Marked up all PDFs in Acrobat and uploaded them to DeskNet for review and sign-off.
- + Produced all documents in English and French and supply a print and web PDF for each document (over 700 PDFs). Signed off on the testing and went live in February 2016 for the digital issue. Saved 1.5 full-time-equivalent resources.

### *Fundamentals* Print Marketing Magazine

- + Oversaw the implementation of bringing *Fundamentals* in house. The magazine was printed monthly and distributed to approximately 13,000 English and 4,000 French financial advisors.
- + Worked closely with internal departments across the organization, as well as with external print vendors and translators, to help evolve the job driven by process and need for accuracy.
- + Was good at foreseeing issues that could arise, and checked all data and design layouts for inconsistencies. Collaborated with e-Services staff on the development of an automated batch coding system for creating stand-alone fund sheets from *Fundamentals* and uploaded over 300 PDFs to the company's website and Salesforce. In the first year, we saved over \$500,000 in costs by bringing the production of *Fundamentals* in house.

# David Wallace RGD

Toronto, ON | 416-534-1079

david.wallace183@gmail.com

www.linkedin.com/in/wallace183

www.davidwallace183.com

---

## SKILLS

Salesforce Marketing Cloud/  
Content Builder, HTML5, CSS,  
email marketing, visual identity,  
print design, AODA, Figma,  
Workfront, Aprimo, Microsoft  
Office Suite, (PowerPoint, Excel,  
Word), Adobe Creative Suite,  
(Photoshop, Dreamweaver,  
InDesign, Illustrator, Adobe XD  
and Acrobat Pro).

## Automation of Fund Facts Documents

- + Amendments to National Instruments (NI) 81-101 required the creation of Point-Of-Sale documents in the form of Fund Facts documents.
- + Worked in a group environment to help review a number of vendors that were invited to present proposals; Transmission Media was selected as the vendor of choice. Worked with Transmission Media in creating an automated workflow process that allowed for the creation, review, editing and approval of Fund Facts documents online in English and French. As a result, Invesco was able to meet regulatory timelines as well as benefit from resource efficiencies gained from not producing the Fact Facts documents in house.

## Invesco Canada Administrative Guide

- + Reviewed the company's Administrative Guide to determine if there was a way to help minimize the impact of this job on the Marketing department. In the past, this job would use up over 300 hours of design resources every time it was updated, or \$8,000 in outsourcing costs.
- + Did the analysis and determined that the guidebook could effectively be converted from InDesign into Microsoft Word using style sheets and blacklining so that e-back office staff could update the files easily and without diminishing the integrity of the job in English and French.
- + Set up and facilitated a training session for the e-back office users and external French translators. With an upgrade to the company's website the guidebook's content is now an HTML version for e-back offices.

## Automation of Annual Reports

- + In 2005, I played an active part in finding a solution to improve the accuracy of the financial reporting process, and to meet the more stringent timelines mandated by NI 81-106. GCOM was selected as the vendor to facilitate the improvements to this process. This project was initiated to implement GCOM's Fund Suit application, which replaced the Excel spreadsheets that Fund Reporting staff had used for current and historical data for management reports of fund performance and financial statements. I participated actively in creating a transition plan and implementing the project. In 2007, after running a parallel run the graphic design studio staff were no longer needed to help produce such documents, which saved one full-time staff and four full-time freelancers.

## Annual and Semi-annual Reports

- + Developed a comprehensive calendar for use in determining resource requirements and deadlines for annual and semi-annual reports, thereby better managing deadlines and resources.
- + Managed all aspects of the design of the reports, consistently delivering on expectations, no matter what the challenges were or obstacles that lay ahead.
- + Worked diligently with Marketing Services, Corporate Initiatives, IT and Finance staff to improve on processes.
- + Worked with internal French translators and the French auditors from E&Y and PwC to keep all French files on track and on par with English.
- + Successfully recruited a team of temp designers who understood the process and workflow, so they could be called on when additional resources were needed.

---

## EDUCATION AND PROFESSIONAL DEVELOPMENT

### Ryerson University, Continuing Education

Advanced Training Designation: Website Design and Development, 2007 to 2009

### Ontario College of Art and Design

Communication & Design (Honours), AOCA, 1977-81

5th year assistantship, Ontario College of Art, 1981-82

IFIC - Investment Funds Institute of Canada, November 2008

RGD - The Association of Registered Graphic Designers, April 1998

---

## INTERESTS

Walking, Hiking, Gardening, Home Restoration, Stock Markets