

Hannah Lindqvist

Asset Management Analyst

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SUMMARY

Asset Management Analyst with 3 years supporting a \$12B institutional asset management platform in Charlotte. Writes SQL queries and Power BI dashboards for portfolio and fee reporting, reconciles holdings in Microsoft Excel, and prepares PowerPoint review books for clients, using strong time management skills during month-end.

EXPERIENCE

Asset Management Analyst 05/2024 - Present

Queen City Investment Management Charlotte, NC

Institutional manager with \$12B across fixed income and multi-asset mandates.

- Build **18** Power BI dashboards on performance, flows and fees used by portfolio managers and sales.
- Write SQL queries on the holdings warehouse that cut monthly report preparation from 4 days to 1.5.
- Review positions and cash for 65 separate accounts against custodian files in Microsoft Excel each day.
- Produce quarterly PowerPoint review books for 30 pension and insurance clients.

Investment Operations Analyst 07/2023 - 04/2024

Piedmont Fiduciary Services Charlotte, NC

Trust and custody provider for 2,000 institutional and family accounts.

- Processed **400** trade settlements a month and resolved 95% of breaks before the next business day.
- Calculated management fees for 120 accounts and caught \$41K in fee billing errors.
- Documented 14 procedures for the corporate actions and fee billing workflows.
- Answered 25 client service requests a week on cash movements and statement questions.

Finance Intern 05/2022 - 08/2022

Uptown Members Credit Union Charlotte, NC

Summer internship on the treasury and finance team.

- Built an Excel tracker for **300** certificate maturities and renewal rates.
- Pulled monthly member deposit data with SQL for the treasury liquidity report.
- Drafted 4 PowerPoint briefs on peer deposit pricing for the CFO.

SKILLS

- Asset Management
- SQL
- Power BI
- Microsoft Excel
- PowerPoint
- Fee Billing
- Corporate Actions
- Attention to Detail
- Time Management Skills

EDUCATION

Bachelor of Science in Business Administration

University of North Carolina at Charlotte

Finance

Charlotte, NC

05/2023

CERTIFICATES

CFA Level I (Passed)

CFA Institute

02/2025