

JOHN SMITH

PORTFOLIO MANAGER

CONTACT

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SUMMARY

Highly experienced Portfolio Manager with a strong background in accounting and finance, seeking a challenging role in portfolio management.

SKILLS

- Financial Modeling
- Data Analysis
- Portfolio Management
- Risk Management
- Leadership

EDUCATION

Bachelor of Science in Accounting

Aug 2015 - May 2019

New York University

New York, USA

Accounting 3.8/4.0

LANGUAGES

English Native

CERTIFICATES

CPA Certification Jun 2020

American Institute of Certified Public Accountants (AICPA)

Certified Public Accountant (CPA) certification with a score of 90%

EXPERIENCE

Portfolio Manager

Jun 2020 - Present

Deloitte

New York, USA

Portfolio Manager responsible for managing a \$100 million portfolio of assets, resulting in a 25% increase in portfolio value within 6 months

- Developed and implemented investment strategies to achieve portfolio objectives, resulting in a 15% increase in returns
- Conducted thorough risk assessments and implemented mitigation strategies to minimize losses, resulting in a 10% reduction in risk exposure
- Collaborated with cross-functional teams to ensure alignment with business objectives, resulting in a 20% increase in portfolio growth

Senior Accountant

Jan 2019 - Jun 2020

KPMG

New York, USA

Senior Accountant responsible for managing a team of 5 accountants, resulting in a 30% increase in team productivity

- Managed and reviewed financial statements, resulting in a 25% reduction in errors
- Developed and implemented process improvements, resulting in a 20% increase in efficiency
- Collaborated with clients to provide audit and assurance services, resulting in a 95% client satisfaction rate

PROJECTS

Portfolio Management Tool

Jan 2020 - Jun 2020

Project Manager

Developed a portfolio management tool using Python and Excel, resulting in a 40% increase in portfolio management efficiency

Python • Excel