

Nikhil

+16723371208 | Usernamenikhilsharma@gmail.com | [Linkedin](#) |

2+ years of experience in client handling, financial & market data analysis, disclosure and reporting in a fast-paced Agile team

Career Highlights

- **CFA Level 1 Registered** Candidate (CFA Institute - 2025)
- **Proficient in financial IT tools** – Advanced Excel skills, Microsoft Word, PowerPoint, Power BI with understanding of database concepts
- **Soft skills:** Excellent organizational and time management skills, strong attention to detail, strong verbal and written communication skills with superior business acumen
- Worked on various crowdfunding campaigns, road safety campaigns as part of **volunteering experience**

EXPERIENCE

Financial Assistant – (Full-time)

June 2024 – Present

Dial Enserch, Dallas, Texas USA (Remote)

- Actively participated in continuous **process optimization**, proposing and implementing solutions that resulted in a **15%** increase in turnaround time for credit applications.
- Maintained high level of security and control of documents, ensuring **compliance** with company policies and industry regulations.
- Analyzed financials, credit reports and work history of over 250 clients to evaluate the **risk appetite & creditworthiness** of applications.

Business Project Manager & Web Development Consultant (Freelance)

December 2022 –Present

[R Marketing Minds](#) Dallas, Texas

- Built and Managed team of 4, delivering 35+ Projects in Web Development, e-commerce **optimization**, and online branding, Generating \$70,000 USD in **revenue (2024)**.
- Directed end-to-end project lifecycles – from requirement gathering, scope definition, and **budget allocation** to design, development, and delivery.
- Implemented **SEO** strategies that improved client website, rankings, boosting organic traffic by up to 70% within 6 months.
- Built and maintained **long-term client relationships**, leading to **65%** repeat business rate.

Sales Intern (Jalandhar, India)

April 2022 – August 2022

Sonam Enterprise, Jalandhar

- Collaborated with sales team to organize promotional events and campaigns, **improving brand visibility** in local market.
- Supporting the preparation of sales proposal and quotations tailored to client need.
- Conducted market research to identify potential opportunities and competitors pricing strategies.
- Maintained strong client relationships by handling inquiries and providing timely follow-ups.
- Managed assisted in **general leads** and **pitching products** to prospective customers, contributing to **75% increase in sales** during internship period.

EDUCATION

Post Graduate Certificate in Business Administration

- *Camosun College of Business, Victoria*

January 2025 – August 2026

CFA Level 1 Registered Candidate | CFA Institute

June 2025 – Present

- Done studying **Alternative Investments, Fixed Income, Equity Investments** Exam on 14 November 2025

Bachelor of Business Administration (BBA)

PTU University, Jalandhar

Undergraduate degree in Business Administration

June 2021 – June 2024

Group PROJECTS

Developed a portfolio of mutual funds according to the financial Requirement in College

- Did asset allocation amongst securities.
- Analyzed fund excel sheets of chosen securities.

EXTRA-CURRICULAR ACTIVITIES

Manage Personal Portfolio of \$40,000 CAD / *Personal Investments*

March 2021 – August 2025

- Invest in Indian **equities**, **mutual funds**, and **ETFs** with a focus on long-term growth.
- Monitor portfolio performance against benchmark such as **S&P500** and Sensex.
- Conduct fundamental and **technical analysis**, tracking macroeconomic indicators in both markets.

Certifications

1. Accounting & Finance Statements Analysis ([Wall Street Prep](#) - 2025)
2. Bloomberg Financial Markets (Bloomberg – 2025)
3. Preparing For Chartered Financial Analyst