

Nikhil

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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) <i>Dial Enserch, Dallas, Texas USA (Remote)</i>	June 2024 – Present
<ul style="list-style-type: none">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) <i>R Marketing Minds Dallas, Texas</i>	December 2022 –Present
<ul style="list-style-type: none">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) <i>Sonam Enterprise, Jalandhar</i>	April 2022 – August 2022
<ul style="list-style-type: none">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	
<ul style="list-style-type: none"><i>Camosun College of Business, Victoria</i>	January 2025 – August 2026
CFA Level 1 Registered Candidate CFA Institute	June 2025 – Present
<ul style="list-style-type: none">Done studying Alternative Investments, Fixed Income, Equity Investments Exam on 14 November 2025	
Bachelor of Business Administration (BBA)	
<i>PTU University, Jalandhar</i> 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