[http://www.linkedin.com/pub/ami-shah/46/b0/a17](http://www.linkedin.com/pub/ami-shah/46/b0/a17" \o "View public profile)

**SUMMARY**

* Over 2.5 years of functional experience, with most recent experience of financial and business analysis for a rapidly growing auto dealership & financing group; Worked closely with CFO and executive management team on daily basis
* Strong academic background in finance: Master of science in Finance from University of Texas at Dallas, Masters of Financial Analysis, Bachelor’s degree in Management, CFA level 1 completed
* Hands-on experience utilizing data from diverse financial and information systems to build tools and forecasting models that remarkably improve organizational decision making capabilities
* Demonstrated track record providing comprehensive financial forecasting, budgeting, and business analysis to senior management team
* Ability to leverage new technologies in support of business objectives.
* Excellent verbal and written communication skills with an ability to liaise across functions and business units to promote organizational success

**PROFESSIONAL EXPERIENCE**

**Tricolor Auto Group,** Irving, TX

**Senior Financial Analyst June 2012- June 2013**

* **Financial Analysis**
  + Performed financial and business analysis requested by CFO and Executive Management team.
  + Reviewed monthly Financial Statements and reports and conducted variance analysis and bottom line analyses to facilitate executive-level decision making.
  + Prepared and analyzed monthly financial reporting package for Board members.
  + Prepared ad hoc reports for all departments as required.
* **Budgeting**
* Worked with department heads to prepare and review their detailed mid-year and annual Budget. Recommended budget optimization, and other cost improvement measures.
* Reviewed monthly financial results and reports to analyze variations in budget and actual performance.
* Collaborated with peers in Accounting and multiple departments to perform variance analysis.
* **Forecasting**
* Liaised across Sales, Inventory, Accounting, Risk Management and Underwriting units to formulate financial forecast with highest accuracy.
* Analyzed financial data for the purpose of determining past financial performance and to project a financial probability.
* Prepared detailed excel models to identify trends and develop forecasts for sales and loan portfolio.
* **Cash Management**
* Performed daily cash management by reviewing accounts payable, cash collections and bank clearing account for exception items.
* Analyzed and monitored collateral and loan position with banks and conducted liquidity analysis.
* Served as a primary backup to Controller.

**HSBC BANK,** India

**Customer Relationship Officer Mar 2006- Nov 2007**

* Persistently achieved high customer retention and growth rate, much higher than the department average in home mortgages and personal loans.
* Created custom-tailored investment plans for financial planning of Bank’s high profile mortgage customers.
* Assisted product development department in launching and promoting financial services of the bank into the market.
* Processed banking transactions accurately and in timely manner to build customer confidence and trust, based on established policies and procedures.
* Generated comprehensive monthly report on team members’ individual performance.
* Provided training to the new hires.

**TECHNICAL SKILLS**

* **Finance Tool :** Capital IQ , Bloomberg,AccountMate,EDGAR, Mergent Online, S&P NetAdvantage
* **Packages:** Microsoft Office (Word/PowerPoint/Excel/Access), Outlook

**EDUCATION & CERTIFICATION**

**CFA Candidate, Passed Level I in December 2013**

CFA Institute

**Master of Science in Finance Aug 2010- May 2012**

University of Texas at Dallas, School of Management (GPA 3.9/4.0)

* 12 hours of Accounting Courses
* Certificate of Graduation “ With High Distinction- GPA 3.9/4.0”
* Recipient of “School of Management Dean's Excellence Scholarship”, Spring 2012

**Master of Financial Analysis Dec 2007-May 2009**

ICFAI University, India (Institute of Chartered Financial Analysts of India)

**Bachelor of Management Studies, Major in Finance May 2002-April 2005**

University of Mumbai, India

**ACADEMIC PROJECTS AND PRESENTATIONS**

**Financial Statement Analysis – Forecasting and Valuation**

* Based on fundamentals and quantitative analysis of operating performances, forecasted financial statements of three major public companies in retail industry.
* Performed financialmodeling and presented extensive report on equity valuation using discounted cash flow model.
* Conducted extensive use of research tools such as Capital IQ and Bloomberg.

**Business and Equity Valuation**

* Performed in depth analysis of the company business model, strategy, revenue & cost drivers, industry and competitors.
* Analyzed the company’s quarterly and annual financial performance and forecasted financial statements.
* Performed valuation of company and equity based on Dividend Discount Model, Discounted Cash Flow Model (DCF) and relative valuation model. Provided recommendations for investments based on analysis.

**Financial Ratios Analysis**

* Presented financial ratio analysis of a leading food and beverage public company- ‘Dean Foods’.
* Scrutinized liquidity, profitability, efficiency, leverage and valuation ratios and compared it with industry benchmark.
* Conducted DuPont analysis and provided SWOT analysis of the company.

**RELEVANT COURSEWORK**

Financial Statement Analysis, Intermediate Financial Accounting I & II, Advance Financial Management, Accounting for Managers, Financial Management, Quantitative Methods in Finance, Investment Management.