

ANNA GOETZ



Fund & Portfolio Analyst

CONTACT

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- https://annagtz2022.github.io/portfolio_AKJ/

EDUCATION

Master's in Economics of enterprise, 2015

Odessa National Polytechnic University, Ukraine

Bachelor's in Metallurgy, 2012

National Metallurgical Academy of Ukraine

SKILLS

- Research and analysis
- Critical thinking
- Continuous learning
- Efficient work practices
- Meticulous attention to detail
- Fast-paced work environment
- Advanced in Excel (incl. Power Pivot), PowerPoint
- Familiar with SQL, Power BI, and Python
- Excellent communication and interpersonal skills

LANGUAGES

| | |
|-----------|--------|
| English | fluent |
| Ukrainian | native |
| Russian | native |

HOBBIES



ABOUT ME

I am a versatile professional with a diverse skill set and extensive experience in various areas, including financial product sales, management, research, data analysis, and visualization. My proactive approach, enthusiasm, rapid learning ability, and adeptness in navigating high-pressure environments have consistently contributed to exceeding targets, leading to frequent promotions and increased responsibilities. I possess exceptional communication skills and have honed my ability to build trusted relationships with people from various backgrounds.

EXPERIENCE

Embassy of Ukraine in the Kingdom of Norway | 2022-2023

Humanitarian Operations Assistant, Volunteer

I prepared shipping documents, tracked aid donations and shipments in spreadsheets, and calculated the value of humanitarian aid.

Infosystem Center LLC | Odessa, Ukraine | 2019

Information and communication network operator

I assisted users with software functionality and effectively addressed claims between clients and drivers, providing comprehensive support and resolving any issues that arose.

PLASKE PJSC (cargo company) | Odessa, Ukraine | 2017-2018

Accountant

I accurately recorded and oversaw financial transactions, collaborating with cross-functional teams to ensure the timely and accurate delivery of relevant data for daily operational evaluations. Additionally, I effectively managed payment accounts and maintained financial balance between systems.

PLASKE PJSC (cargo company) | Odessa, Ukraine | 2015-2017

Office Support Specialist

I was responsible for end-to-end order handling, support process optimization, handling service contracts (including supplier research, evaluation and selection), budget planning, invoice processing, office supply and equipment management, and its inventory audits. Through meticulous research and comprehensive data analysis of office expenses and processes, I successfully identified valuable cost-saving opportunities and improved process efficiency. Additionally, I maintained open lines of communication with vendors and stakeholders to ensure smooth operations, and promptly resolving issues.

Consumer Center LLC (loan center) | Odessa, Ukraine | 2014-2015

Department manager

Managing customer accounts, and training and supervising new employees to provide high-quality service have helped me consistently exceed sales revenue targets. Additionally, I maintained office policies and procedures, managed equipment inventory, and ensured efficient office operations. I also maintained accurate records of all funds and was primarily responsible for their collection.

Delta Bank JSC | Yalta, Crimea, Ukraine | 2011-2014

Account manager

I efficiently manage clients' accounts, providing them with financial advice and effective solutions, while also processing transactions with utmost accuracy. I have consistently demonstrated a strong ability to build and foster enduring client relationships, leading to their continued loyalty and satisfaction. This ability have helped me surpassing sales revenue targets, and have resulted in my achievement of being one of the top three performers among bank branches.

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3 July 2023

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PERSONAL DETAILS

Nationality

Ukrainian

Date of birth

01.06.1987

Marital status

Married

REFERENCES

Available upon request

Please feel free to browse my portfolio.

https://annagtz2022.github.io/portfolio_AKJ/



Dear Katharina,

I am thrilled to submit my application for the Fund & Portfolio Analyst position at AKJ. As someone passionate about working with data and continuously learning and utilizing new technology tools, I am excited about the opportunity to become an integral part of the hedge fund industry. With the unique chance to gain insight into the fund industry across different jurisdictions, I am driven to excel in this role and make a meaningful contribution to AKJ's mission. Moreover, the vision and culture of AKJ deeply resonate with my core values and aspirations, making it a perfect fit for me.

Throughout my career, I have gained extensive experience in various areas such as financial product sales, department management, operational efficiency, research, and analysis. For example, I have successfully identified cost-saving opportunities and improved process efficiency through meticulous data analysis. My proactive approach, enthusiasm, curiosity to acquire new knowledge, rapid learning ability, and adeptness in navigating high-pressure environments have consistently contributed to exceeding targets, leading to frequent promotions and increased responsibilities.

I actively pursue the expansion of my knowledge in Excel, SQL, Power BI, and Python for data analysis purposes, and I am committed to continuous learning. In fact, I recently completed several projects where I utilized Excel, SQL, and Power BI to analyze and visualize financial data, gaining valuable hands-on experience in these tools.

Having lived in different countries (Austria, 2019–2021, and Norway, since January 2022), I appreciate diverse cultures and possess excellent communication and interpersonal skills. My volunteer experience at the Embassy of Ukraine in the Kingdom of Norway and translation work for the Historical Museum have honed my organizational, analytical, and language skills, as well as attention to detail.

I am a holder of a residence card in Norway, and I bring a proactive, curious and positive mindset to every challenge, thriving in fast-paced environments. With my diverse background, strong research and analytical skills, continuous learning mindset, commitment to self-improvement, and genuine passion for technology and data, I am confident in my ability to quickly grasp new concepts and become a valuable asset to the AKJ team.

Thank you for considering my application. I look forward to the opportunity to discuss my qualifications further with you.

Sincerely,

Anna Goetz