Akshar Patel

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**EDUCATION**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**California State University, Long Beach (Master’s of Science) – Finance (MSF)** **August 2022 – July 2023**

Related coursework: Quantitative Investment Analysis, Corporate Finance, Economics / International Finance, Seminar in Derivatives, Seminar in Financial Institutions & Ethics, Seminar in Fixed Income Analysis, Seminar in Equity Securities & Valuations, Integrated Financial Management

**California State University, Long Beach (Bachelor’s of Science): Finance** **January 2020 – May 2022**

Related coursework: Single-variable Multivariable Calculus, Introduction to Linear Algebra, Portfolio Analysis, International Finance, Business Strategy & Policy, Fixed Income Analysis

**PROJECTS**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_­­­

**Portfolio Management Analysis Novemeber 2021**

* Strategically built a diversified portfolio based on market research and analysis of 15 + securities to exceed the rate of return using CAPM model after accounting for the income tax effect
* Collaborated with stakeholders to strategize a fundamental analysis using intrinsic value of different types of securities to focus our goal on creating a diverse business portfolio for undervalued stocks which produced a return of 6.3%

**Financial Statement Analysis (Company Stock Valuation) March 2021**

* Analyzed Home Depot risk management profile with historical dividend payout, capital structure and degree of leverage to provide strategic business solutions to increase company value
* Organized the financial annual report by using Excel and PowerPoint to show visualization of estimations of future earnings, presented the data visualizations to clients

**Securities Predictive Analysis September -2022**

* Developed and implemented successful regression models within in Python to provide clients with valuable insights for investment decisions, presented the findings and insights in a clear and concise manner using data visualization in Python
* Collaborated with team members to conduct regular testing and evaluation of predictive models, identifying areas for improvement, implementing changes to ensure ongoing accuracy and effectiveness

**EXPERIENCE**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_­­­­­­­

**MRNB Corporation -** *Financial Analyst* **(**Anaheim, CA**) May 2020 – March 2021**

* Developed and maintained financial models (Excel) for sales forecasting, budgeting, and inventory management using model to independently prepare financial analysis within time frame.
* Collaborated with cross-functional teams producing financial reports within Excel to make strategic business decisions increasing productivity rates by 2%
* Analyzed data from different teams to generate monthly budgets resulting in allocating resources to stakeholders based on business needs and project timelines.
* Creating an annual budget, building a detailed financial tracking model, having on going audits, reports that helps team members.
* Adapting and allocating resources based on business needs to each stakeholder, providing assistance to stakeholders based of allocated resources.

**Statewide Distributors** - *Financial Analyst* (Ontario, CA) **June2021- March 2022**

* Developed and maintained financial models (Excel) for sales forecasting, budgeting and inventory management using this model to independently prepare financial analysis within a given time frame.
* Collaborating with team to identify problems, solving complex problems by developing strategic business decisions.
* Demonstrated ability to effectively collaborate in a team at all levels of the organization to gain a comprehensive understanding of business needs and challenges.
* Utilized quantitative thinking and analysis skills to breakdown complex financial data and identifying underlying patterns, trends, and insights.

**William Grant & Sons Inc.** – *Finance Manager (Irvine, CA)* **July 2023 – September 2023**

* Support Region teams with appropriate analysis/insight regarding volume planning, spending, and KPIs. Reviewing and reporting on execution throughout the Region.
* Provide expert financial support to the market leads to review and evaluate new brand / variants / customer opportunities and to address key business challenges.
* Work collaboratively with relevant commercial and marketing teams to ensure delivery of other key business measures - stock efficiency, credit control, overheads.
* Liaise with other finance and Supply Chain functions to provide accurate and insightful management information.
* Managing and providing oversight/direction regarding all Region price structures, pricing management, distributor margin analysis, and competitive pricing analysis, pricing elasticity studies, etc. and ensuring brand pricing guidelines are executed.
* Reviews and processes invoices for payment for submittal to accounting. Advises inquiring vendors regarding status of payment for invoices and check date information.
* Advises inquiring IT vendors regarding status of payment for invoices and advises of check.
* Creates and maintain spreadsheets tracking vendor and contract costs against budget and authorized spend.
* Interacts with various Division, City Departments, vendors and prospective IT vendors.
* Gathers and analyzes data as needed to perform administrative support in preparation of special reports for the Division.
* Gathers and analyzes data, composes charts and graphs as needed to perform administrative support in preparation of special reports and projects for the Division.

**LEADERSHIP**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Indian Student Association – Vice-President (California State University Long Beach) January 2022 – May 2022**

* Researched creators / precentors, venues and target audience, organized events, coordinating with stakeholders for timely distribution of marketing content ensuring event success for 1000+

**Member of Financial Management Association (FMA)** **June 2020 – May 2023**

**SKILLS**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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| * Financial Analysis * Financial Modeling * Analytical Skills * Quantitative Analytics * VLOOKUP’s | * Interpersonal/Communication skill * SAP * Corporate Finance * Hyperion * SAP System | * Proficient (Excel, PowerPoint) * Variance Analysis * Power BI * Budgeting * Tableau |