



JAMAL R. WAHEED

MASTER OF ARTS | CFA LEVEL III CANDIDATE

QUALIFICATIONS

- Level III candidate in the CFA Program -
Applicable areas of study:
Portfolio Management, Fixed Income and Quantitative Methods
- Professional experience with derivative products
- Professional experience in financial modeling, financial analysis, variance analysis, and forecasting
- Demonstrated leadership capability
- Advanced Excel skills
- Strong, proven analytical skills
- Accustomed to working under pressure in fast paced environment

PROFESSIONAL EXPERIENCE

MARKET ANALYST & CONSULTANT |

STEEL & METALS MARKET RESEARCH GMBH

JANUARY 2018 - APRIL 2020 | REUTTE, AUSTRIA

- Assessed potential suitors to acquire a German stainless steel company
- Evaluated potential acquirers based on financial health, potential synergies, market analysis and company size
- Created financial health report for multiple metal industries
- Wrote client requested analytical reports and presentations covering the appropriate market

BUSINESS ANALYST | DET NORSKE VERITAS

NOVEMBER 2016- OCTOBER 2017 | HOUSTON, TX

- Created accounts receivable and WIP dashboard for regional controller to track accounts receivable balance against company KPIs
- Composed auditor utilization report for regional management team

CASH SPECIALIST (CONTRACT) | DET NORSKE VERITAS

JUNE 2016-NOVEMBER 2016 | HOUSTON, TX

- Reconciled differences between Agresso and Oracle Finance that served as required groundwork for adjustments during transition process to Oracle Finance System

CONTACT



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j.r.waheed@gmail.com

COMPUTER SKILLS

- Microsoft MS Office
- Strong MS Excel skills (vlookup, pivot tables, index, Macros, VBA etc.)
- PowerPoint, SAS, Oracle Finance, Navision, Agresso, Smart View

LANGUAGES

- Fluent in English (native)
- German (advanced, Level B2)
- Spanish (interm., Level A2)

PERSONAL BIO

Born March 23, 1978 in Chicago

Nationality: USA

Marital Status: Married (Austrian)


Residence:

6861 Alberschwende
Vorarlberg

Work Permit/ Visa:

American citizen with German & Austrian work permit/visa

CONTACT

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 j.r.waheed@gmail.com

FINANCIAL ANALYST | SENTERRA LLC

2014- 2015 | HOUSTON, TX

- Created Excel financial model to forecast future expenses and revenue streams
- Calculated amortization schedules, IRR and net present values of cash flows for future business endeavors

BUDGET ANALYST | ILLINOIS ACTION FOR CHILDREN

2009-2012 | CHICAGO, IL

- Drafted yearly budgets and forecasts for multiple programs
- Supervised a team to draft and ensure the accuracy of the organizational budget for each fiscal year

EURODOLLAR TRADER | TRANSMARKET GROUP

2007-2008 | CHICAGO, IL

- Traded Eurodollar short term interest rate contracts on the Chicago Mercantile Exchange Globex

SECURITIES OPERATIONS ASSOCIATE | CITADEL LLC

2004-2005 | CHICAGO, IL

- Ensured that the economic details of the counterparty confirmations agree with Citadel's details of derivatives trade

EDUCATION

University of Denver
2007

Master of Arts in International Studies
Concentration: Economics

Tulane University
2001

Bachelor of Science in Management
Double Major: Economics and Finance

CFA Institute

Current Level III candidate

WIFI Dornbirn
2012-2014

Level B2 in German

PERSONAL INFORMATION

I am an analytical American citizen who has enjoyed life in Europe with my Austrian wife for the past 3+ years. With a baby in the family, we want to set roots close to family.

I am looking for a long term professional position that allows me to grow as an expert in my field, while giving me the opportunity to augment my German skills to a business level.