William Chetankumar Tanna

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Summary

Aspiring finance and analytics professional and CFA Level I candidate pursuing a B.S. in Finance, Business Analytics, and Supply Chain at the University of Illinois Chicago. Experienced in building automated web platforms and OpenAI-driven data systems delivering 20-second processing, 95% consistency, 18x faster execution, and 56x cost savings. Skilled in financial modeling, investment analysis, and analytics solutions that strengthen portfolio decisions, reporting, and ROI.

Education

University of Illinois Chicago, College of Business Administration   **Aug 2022 - May 2026**

Bachelor of Science, Finance, Information Decision & Sciences | Concentration in Business Analytics, Supply Chain & Operations

- **Achievements:** Dean's list: Spring 2023, Fall 2023, Spring 2024, Fall 2024, Fall 2025

Professional Experience

Mirae Asset Sharekhan   **Jul 2024 - Sep 2024**
Finance Intern   *Mumbai, India*

- Performed financial analysis and portfolio diagnostics on 20+ investor accounts worth INR 12 Cr ($1.5M) to support forecasting accuracy.
- Presented equity and mutual fund investment ideas, contributing to three new client acquisitions and stronger portfolio diversification.
- Automated transaction tracking in Excel, improving reporting efficiency by 30% and enhancing data accuracy for financial statements
- Verified client KYC and risk profiles during CRM migration to ensure complete data integrity and compliance in reporting.

Campus Recreation at UIC   **Nov 2023 - Present**
Intramural Sports Referee Supervisor   *Chicago, IL*

- Supervised and trained 30+ referees across multiple sports, maintaining consistent rule enforcement and a safe, controlled game environment.
- Coordinated 50+ weekly game-day operations, managing field readiness, staff assignments, and incident response to ensure smooth event execution.
- De-escalated dozens of high-pressure disputes each semester, leveraging strong communication skills to preserve game integrity.
- Supported referee recruitment and onboarding, helping evaluate candidates and accelerate training for new hires.

Skills

- **Financial Analysis & Modeling**: Financial Modeling, Equity Research, Risk Assessment, Forecasting, Portfolio Analysis, Quantitative Finance, FP&A
- **Data & AI Analytics**: Business Data Mining, Data Cleaning, Machine Learning (LightGBM, XGBoost), Model Evaluation, GPT/LLM Systems, Automation,
- **Technical Tools**: Bloomberg Terminal, R Studio, Excel (Advanced), Microsoft Access, SQL, Python, CRM Systems, Website Building, Tableau

Projects & Leadership

Finance Mentorship Program | University of Illinois Chicago   **Sep 2025 - Present**
Peer Mentor

- Mentor new finance students through three structured meetings focused on internship preparation, course planning, and professional development.
- Provide one-on-one guidance on résumé refinement, networking strategies, and navigating campus career resources.
- Share personal experience in securing internships and balancing academic, CFA, and extracurricular commitments to support student success.

ESG Automation Platform | Winner - Chicago Tech Circle Competition   **Nov 2025 – Dec 2025**
UIC Project - FIN 294, Data + AI

- Built "WITCH FOR FITCH", a platform automating ESG PDF search and Scope 1–3 extraction time in ~20 seconds with ~95% consistency.
- Re-engineered the backend with multi-step validation to remove false positives and increase throughput by 1700%.
- Delivered a scalable pipeline that is 56x cheaper and 18x faster than human review, winning the 2025 Chicago Tech Circle Competition.

Pathfind Careers AI Workflow | Red Circle Consulting   **Oct 2025 - Nov 2025**
UIC Project – Fin 294, Data + AI

- Developed a multi-agent GPT system in LogicStudio that reduced résumé review time, improving speed by 98% and accuracy by 90%.
- Designed five specialized agents to automate résumé parsing, job matching, and outreach while lowering costs from $4,000 to $23 per agent.
- Delivered a functional prototype that generated top 10 job matches with verified listings and personalized recruiter email drafts.

Lending Club Credit Risk Modeling   **Sep 2025 – Oct 2025**
UIC Project - Fin 294, Data + AI

- Developed a LightGBM model that increased loan-default accuracy from 57% to 99.9%, cutting losses by 95% and generating $889M in projected profit.
- Applied feature engineering, data preprocessing, and hyperparameter tuning on 150+ borrower variables to enhance model precision and recall.
- Created a confusion-matrix-based ROI analysis and Model Card addressing business impact, fairness, and bias mitigation.

Advanced Investment Management   **Jan 2025 - May 2025**
Student Equity Analyst, Consumer Goods Sector – UIC FIN 456

- Managed part of a $150,000 real-money student portfolio, using Bloomberg Terminal for equity screening, valuation, and performance tracking.
- Authored a 20+ page investment thesis on Gap Inc., supporting a "Buy" rating based on DCF valuation ($43.12 vs. $21.01) and 15.2% projected growth.
- Proposed a 1% portfolio allocation (~$1,200) to reduce Financials' overweight and improve Consumer Discretionary exposure from -2.65% to -1.65%.

Certification

- **SAP Global Trade Services – Record of Achievement:** SAP Learning
- **Business Analysis Foundations:** NASBA, IIBA, PMI
- **Financial Modeling Foundations:** NASBA
- **AWS Academy – Data Engineering:** AWS Academy