



HARPER LEWIS

Fund Analyst

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📍 Los Angeles
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PROFESSIONAL SUMMARY

Proficient Fund Analyst with 5 years of experience in financial analysis and fund management. Skilled in data interpretation, portfolio reconciliation, and generating strategic reports to inform investment decisions. Excited to apply expertise in optimizing fund performance and driving data-driven strategies within a collaborative financial environment.

WORK EXPERIENCE

Fund Analyst

Maple Leaf Consulting

📅 Feb / 2021-Ongoing

📍 Toronto, ON

1. Managed operations for two components of a multi-million dollar service fund, ensuring compliance and efficiency.
2. Refined existing division procedures to enhance reporting accuracy and speed.
3. Developed efficient processes for timely portfolio performance assessments.
4. Reviewed and corrected internal system entries for quarterly filings, ensuring data integrity.
5. Processed invoices related to hedge funds, ensuring accurate and timely payments.
6. Expanded product knowledge across various fixed income markets and investment products.
7. Served as a primary contact for Wealth Management teams, addressing inquiries about portfolio performance and positioning.

Fund Analyst

Silver Lake Enterprises

📅 Feb / 2020-Feb / 2021

📍 Seattle, WA

1. Provided administrative and analytical support to hedge funds, enhancing operational efficiency.
2. Processed capital activity and executed fund NAV calculations, ensuring accuracy in financial reporting.
3. Conducted detailed analysis for stock pitches, including market share and P/E ratio evaluations.
4. Performed daily fund reconciliations and managed client communications for month-end deliverables.
5. Researched and reconciled shareholder accounts for compliance projects, improving accuracy.
6. Assisted in portfolio security selection through collaborative analysis and voting on stock pitches.

EDUCATION

Bachelor of Science in Finance

University of Chicago

📅 Feb / 2019-Feb / 2020

📍 Phoenix, AZ

Focused on investment analysis, financial modeling, and portfolio management.

SKILLS

Statistical Analysis



Research Skills



Industry Knowledge



Financial Forecasting



Investment Strategies



Cash Flow Analysis



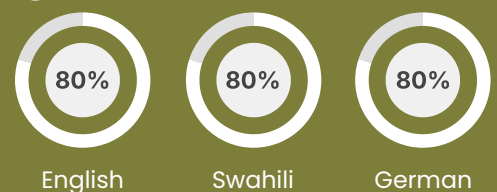
INTERESTS

- 🏊 Scuba Diving 🎮 E-sports
📖 Reading Fiction 🧩 Puzzle Solving

STRENGTHS

- 📋 Stewardship 👥 Teamwork
🔑 Tenacity 🏗 Vision

LANGUAGES



ACHIEVEMENTS

- 🌟 Increased fund performance by 15% through strategic analysis and reporting.
🌟 Implemented a new reconciliation process that reduced errors by 20%.