

# LIAM ANDERSON

## Portfolio Analyst

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### PROFESSIONAL SUMMARY

Accomplished Portfolio Analyst with 10 years of extensive experience in financial modeling, risk assessment, and strategic investment analysis. Proven track record in optimizing portfolio performance through data-driven insights and innovative asset allocation strategies. Committed to enhancing client relationships and aligning investment strategies with market trends for maximum impact.

### WORK EXPERIENCE

Portfolio Analyst I Jan / 2019-Ongoing  
Quantum Solutions LLC Phoenix, AZ

- Managed comprehensive financial data analysis to support investment decision-making and enhance portfolio performance.
- Recognized for excellence in quality assurance metrics, contributing to a 15% improvement in operational efficiency.
- Utilized SEC documents and company reports to ensure accurate data updates in financial systems.
- Streamlined operational workflows, leading department-wide efficiency improvements.
- Provided exceptional client support by leveraging new technology features for enhanced service delivery.
- Collaborated with various departments to produce detailed quarterly and annual investment reports.
- Ensured data integrity of substantial shareholder profiles using advanced analytics tools.

Portfolio Analyst Jan / 2015-Jan / 2019  
Lakeside Apparel Co Chicago, IL

- Supported the Portfolio Management team in investment strategy implementation, portfolio rebalancing, and performance monitoring.
- Conducted in-depth portfolio analysis and attribution reporting, delivering actionable insights for investment decisions.
- Participated in research initiatives aimed at enhancing the investment process and model development.
- Coordinated with technology teams to maintain a robust infrastructure for data management and reporting.
- Documented processes to ensure compliance and operational efficiency across portfolio management activities.

### EDUCATION

Master of Business Administration Jan / 2012-Jan / 2015  
University of Chicago Seattle, WA

Specialized in finance with a focus on investment strategies and portfolio management.



### SKILLS

- Advanced Excel Skills  
Investment Performance Analysis  
Portfolio Management  
Risk Assessment Techniques  
Alternative Investments

### INTERESTS

- Home Brewing Wildlife Conservation  
Running Public Speaking

### STRENGTHS

- Willingness Wisdom  
Zeal Ingenuity

### LANGUAGES



### ACHIEVEMENTS

- Increased portfolio returns by 20% through strategic asset reallocation and risk management.
- Implemented a new reporting framework that improved performance tracking efficiency by 30%.