

Lisa Daniels

Chartered Financial Analyst (CFA)

Lisa@email.com

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www.linkedin.com/company/17951573

September 1983

English, Afrikaans, Zulu, Spanish

1 New Road, Cape Town, South Africa

PERSONAL SUMMARY

An analytic and meticulous Chartered Financial Analyst with over 10 years of professional experience. Highly proficient in providing businesses with financial analysis and accounting support. Proven ability to review numbers and statistics to make sound financial predictions. A team leader who has exceptional communication and interpersonal skills along with a deep respect for deadlines. Highly adaptable to change. Work extremely well with cross-functional teams. I possess expert-level analytic and financial modelling abilities, strategic thinking, exceptional presentation skills, knowledge of ERP systems and excellent time management skills. Well-informed in current financial forecasting and diagnosis as well as hands-on experience with statistical analysis and packages.

EDUCATION

UNIVERSITY OF SOUTH AFRICA
2008
BACHELOR OF ACCOUNTING SCIENCES MASTERS

UNIVERSITY OF SOUTH AFRICA
2007
BACHELOR OF ACCOUNTING SCIENCES HONOURS

UNIVERSITY OF SOUTH AFRICA
2006
BACHELOR OF ACCOUNTING SCIENCES

DANVILLE PARK GIRLS HIGH SCHOOL
2002
MATRIC

CAREER HISTORY

CHARTERED FINANCIAL ANALYST

WORLD BANK
2016 – CURRENT
Summary

Performing financial forecasting, reporting, and operational metrics tracking. Analysing financial data and creating financial models for decision support. Reporting on financial performance and preparing for regular leadership reviews. Analysing past results, performing variance analysis, identifying trends, and making recommendations for improvements. Working closely with the accounting team to ensure accurate financial reporting and decision support. Evaluating financial performance by comparing and analysing actual results with plans and forecasts.

KEY SKILLS

- Data Analysis
- Projections Preparation
- Trends Identification
- Forecasting
- Cost Reduction Methodologies
- Reconciliation
- Budget Variance Handling
- Action Recommendation
- Expenditure Evaluation
- Strategy Development
- Process Improvements
- Research Results Reporting

MEMBERSHIPS

- CFA Society Membership
- Chartered Global Management Accountant (CGMA)

ATTRIBUTES

- Articulate
- Organised
- Meticulous
- Technological
- Patient
- Determined
- Systematic

REFERENCES

- JACOB STIRLING
  World Bank
  ☎ email@address.com
- MARK JOURBERT
  Standard Chattered
  ☎ email@address.com
- LINDA FYN
  FNB
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South African

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CAREER HISTORY

Guiding cost analysis process by establishing and enforcing policies and procedures. Providing analysis of trends and forecasts and recommending actions for optimisation.

Achievements

- Partnered with the procurement department and reduced open purchase orders by 68% which resulted in a cost savings of $2.2M.
- Implemented and streamlined cutting-edge data management procedures, improving the operational efficiency of the company by 5%.
- Spearheaded & streamlined headcount actuals for various programs creating an overall savings of 12% due to an effective forecasting model that evaluated actuals versus monthly budgeted forecast.

ANALYST

STANDARDS CHATTERED

2014 – 2016

Summary

Developed detailed forecast models against budgets based on key indicators, increasing accuracy of short and long-term earnings estimates. Produced financial reports evaluating completed projects, identifying current trends and evaluating variances. Compiled data to generate financial statements including cash flow, P&L, and balance sheet for review by management. Performed due diligence on new development projects.

Achievements

- Introduced a unique data analysis system which increased analytic accuracy by 65%.
- Implemented a data refinement system, as a result, reduced data refinement time by 50%.
- Devised a supportive calculations system, which proved to be less time-taking than the system already in place.

JUNIOR ANALYST

INVESTEC

2010 – 2013

Summary

Researched and evaluated the financial data of firms. Provided the analysis for ROI, and pricing calculations, as well as other comparable metrics used in client advisory. Provided research and analysis to enhance client advisory. Prepared advisory presentations for Senior Analysts and assisted in the advisory of major product initiatives.

Achievements

- Formed part of the team that reduced overhead costs by 35% by employing core cost reduction methodologies.
- Was awarded Analyst of the year accolade in 2012.

INTERN

FNB

2009 – 2010

Summary

Provided support to the financial department and collected data, learned how to write reports, and researched financial trends. Performed variance analysis versus forecasted budget.

Achievements

- Identified and reduced risks through financial statement analysis and process testing.
- Developed financial models for diverse projects and analysis.

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