Nadeem Refai CFA Level I Candidate

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### **EDUCATION:**

- Queen Mary University of London, School of Economics and Finance, London, UK
  - o Master of Science (MSc) | Business Finance
  - o Graduation: October 2017 October 2018
- Temple University, Fox School of Business, Philadelphia, USA
  - o Bachelor of Business Administration | Major: Finance | Minor: Management Information Systems
  - o Dean's List 2014 (Honors list)
  - o Graduation: September 2012 December 2016
- Modern American School, Amman, Jordan
  - o American Highschool Diploma
  - o Graduation: August 2009 June 2012

Selected Courses: Systematic Trading and Investment Strategies, Portfolio Construction Theory, Cases in Business Finance, Quantitative methods in Finance, Commercial and Investment Banking, International Finance, Corporate Finance, Global Business Policies, Finance senior seminar, Investments, Financial Management, Integrative Business Applications, Financial Modeling Excel, Digital Design and Innovation, Strategic Management of IT, Data Analytics, Managerial Accounting, Business Statistics, Financial Accounting, Business Communications, Operations Management, Intro to Risk Management.

### **ACTIVITIES & AWARDS:**

- Chair of Advertisement and Activities, Model United Nations, Temple University.
- Harvard University Model United Nations Conference.
- Organizations: Temple University Association Information Systems, Investments Association, and Model United Nations.
- Certificate of Appreciation and Dedication for customer service, Temple University Housing Staff.

### **EXPERIENCE**:

# PANNEL KERR FORSTER INTERNATIONAL (PKF)

Junior Consultant | Amman, Jordan | January 2017- July 2017

- Conducted due diligence reports and feasibility studies on projects, market research, analysis, project evaluations, and assessed financial analysis studies on companies.
- Assisted in coordinating and communicating the results of consulting projects via written reports and oral/PowerPoint presentations to management.
- Evaluated and assisted with developing business proposals, managed business plans and tender sheets for proposals.
- Aided the senior consultant and/or manager in coordinating fieldwork for assignments by contributing to the
  development of project actions plans, fieldwork task schedules, scheduling and preparing for workshops,
  gathering documentation/data, and liaising with client staff.

### FIDUCIARY INVESTMENT SOLUTIONS, LLC

Accounting/Operations | Philadelphia, USA | September 2016- December 2016

- Entered daily company invoices into accounting system QuickBooks.
- Managed accounts receivable, accounts payable, and manager portfolio payments.
- Assisted vice president of finance with day-to-day operations.
- Organized and managed filing for all accounting purposes.
- Trained and worked with company employees on introducing an expense report system known as Concur.

## **SKILLS & LANGUAGES:**

- Microsoft Office Suite; International Computer Driving License (ICDL)
- Eviews, Bloomberg Market Concepts Certified, SAS Enterprise, QuickBooks, SAP, SQL, WordPress, Google Analytics, Salesforce, CRM- Trained, FactSet, Justinmind prototype.
- English, Arabic Fluent