

Niya Taubitz

Financial Specialist

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📍 125 Main St, Buffalo, NY 14201

Education

**Bachelor of Science in
Finance at Baruch College,
City University of New York,
NY**

Sep 2017 - May 2021

Relevant Coursework: Financial Accounting, Managerial Accounting, Corporate Finance, Investments, Financial Markets, Risk Management, Financial Analysis, International Finance, Personal Finance, and Portfolio Management.

Links

[linkedin.com/in/niyataubitz](https://www.linkedin.com/in/niyataubitz)

Skills

QuickBooks

Excel

Bloomberg Terminal

Financial Modeling

Risk Analysis

Portfolio Management

Tax Preparation

Languages

English

Urdu

Hobbies

Profile

Financial Specialist with 2 years of experience in providing comprehensive financial support and expertise to clients and organizations. Skilled in financial analysis, budgeting, and risk assessment, ensuring optimal financial performance and growth. Proficient in financial software and tools, with a strong commitment to delivering exceptional client service and fostering long-term relationships. Seeking to contribute to a dynamic team and drive financial success through strategic planning and data-driven decision-making.

Employment History

Financial Specialist at Morgan Stanley, NY

Feb 2023 - Present

- Successfully managed a \$50 million investment portfolio for high net worth clients, resulting in an average annual return of 12% over a 3-year period.
- Streamlined the financial reporting process, reducing the time spent on quarterly reports by 20% and increasing overall accuracy.
- Identified and implemented cost-saving measures that reduced operating expenses by 15%, saving the company \$1.2 million annually.
- Led a team of 5 analysts in developing a new risk assessment model, which improved the accuracy of risk predictions by 25% and contributed to better-informed investment decisions.

Associate Financial Specialist at Goldman Sachs, NY

Sep 2021 - Jan 2023

- Successfully managed a \$500 million investment portfolio, achieving an average annual return of 15% over three years and outperforming the benchmark by 5%.
- Led a team that identified and executed on M&A opportunities worth over \$2 billion, resulting in a 20% increase in the firm's market share within the targeted industry.
- Developed and implemented a risk management strategy that reduced non-performing loans by 25% within two years, significantly improving the overall health of the bank's loan portfolio.

Certificates

Certified Financial Planner (CFP)

Nov 2021

Chartered Financial Analyst (CFA)

May 2020

Memberships

Chartered Financial Analyst (CFA) Institute