

RP

Raj Patel

Investment Finance Manager

Investment finance manager with eight years of experience in portfolio analysis, investment performance monitoring, and regulatory reporting. Demonstrated success in optimizing returns while mitigating financial and regulatory risks.

CONTACT



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LinkedIn



City, ST

KEY SKILLS

- Portfolio management
- Investment analytics
- SEC compliance
- Risk-adjusted returns
- Client reporting

EDUCATION

- Bachelor of Science (B.S.) in Economics

Green Valley University, City, ST |
May 2015

PROFESSIONAL EXPERIENCE

Investment Finance Manager | Altera Capital, City, ST
January 2018 - Present

- Oversaw \$500 million diversified fund portfolio with consistent 8 to 10 percent annual ROI
- Ensured compliance with all SEC and FINRA reporting standards
- Partnered with investment team to review fund performance metrics

Investment Analyst | Global Wealth Partners, City, ST
May 2015 - December 2017

- Conducted due diligence on new investment opportunities
- Produced quarterly investor reports with detailed risk analysis
- Developed models for tracking fund alpha and beta