Irish life Candidate Proposal Form

Thank you for your interest in engaging with Irish Life

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| Agreed Rate on role: | 43,000-56,000 |
| Role applying for: | Performance Reporting Analyst |

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| Candidate Proposed: | Ali Jamil |
| Agency Contact Details: | Michael Peniata |
| Salary: | Current: €40,000+ bonus and bens Expectation: €50,000 |
| Current notice period: | 4 weeks’ notice |

Please complete the following information:

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| --- | --- |
| It is company policy to ensure potential and actual conflicts of interest are disclosed.  Please advise if the candidate has family and/ or other personal relationships within the company. |  |
| Is the candidate a European Economic Area or Swiss citizen and therefore have the right to work in the Republic of Ireland. |  |
| If the candidate is not of European Economic Area or Swiss citizen, do they hold a valid permission (work permit or visa) to work in the Republic of Ireland? |  |
| Minimum education standards. 2 honours in 2 higher level subjects in the Leaving Certificate, i.e. C3 or higher (or equivalent) and at least a pass in ordinary level Maths & English.  If completed pre-2007 this requirement may not apply. Where an applicant has gone on to achieve a higher diploma, degree or higher in a business-related topic the minimum requirements do not apply. | CFA Institute: CFA Level 1 Candidate (Exam Date: December 2017).  Bloomberg Institute: Bloomberg Market Concepts Certificate (May 2017) Heriot-Watt University, Edinburgh Sep 2012 - June 2016 BSc Actuarial Science, 2nd Class |

**ALI JAMIL**

# PROFESSIONAL EXPERIENCE

**Performance Reporting Analyst, Fidelity Investments, Dublin June 2016 - Current**

* Support performance technology for Fidelity’s vast range of products and clientele, including mutual funds, ETFs, life insurance, retail, retirement services, and wealth management customers with the use of Fidelity’s own Internal Systems.
* Calculating return impact to accounts and portfolios. Communicating (written and oral) complex Rate of Return calculations through outlier analysis and validation of Fidelity’s large database.
* Resolve daily, weekly, monthly and quarterly exceptions generated through internal performance engine, requiring logical problem solving with occasionally restricted oversight. Reconciling adverse accounts for successful delivery of performance with the use of Microsoft Excel.
* Review and assess the impact of a diverse range of rejected and unvalued transactions from the performance engine. Employing Bloomberg terminal for Ad-hoc research into current corporate actions to value transactions that are too complex for the performance engine.
* Project management, participation and testing on a variety of activities based on business need. Build working relationships and have exposure to senior business partners in such endeavours.
* Examining processes, identifying deficiencies and recommending streamlining measures for more efficient practice.
* Occasionally assist Cost Basis Tax team delivers accurate data analysis, and asset depletions for tax filing purposes.

**Summer Risk Management Internship, National Bank of Pakistan, Karachi**

**July - August 2015**

*Scrutinising loans and financing proposals for both corporate and domestic clients.*

* IT skills: Microsoft Word and Microsoft Excel were utilised mostly as I helped carry out tasks such as data input and producing reports to clients.
* Business Acumen: Observing board meetings provided a guide into the logistics involved in departmental coordination.
* Team Working and Interpersonal Skills: Working as part of a large team within the head offices of the National Bank provided me with great insight in the unfamiliar working environment of Karachi.

# ACADEMIC BACKGROUND AND CERTIFICATION

**CFA Institute:** CFA Level 1 Candidate (Exam Date: December 2017).

**Bloomberg Institute:** Bloomberg Market Concepts Certificate (May 2017)

**HIGHER EDUCATION:**

# Heriot-Watt University, Edinburgh Sep 2012 - June 2016 BSc Actuarial Science, 2nd Class

Modules Studied **(relevant modules in bold):**

Actuarial Maths, Bayesian Inference, Continuous Time Finance, Derivative Finance, Financial Reporting, International Bonds and Currency Markets, Introductory Economics, Statistical Science(SPSS Program), Linear Algebra, Life Insurance, Multivariate Calculus, Numerical Analysis(Matlab), Optimisation, Ordinary Differential Equations, Portfolio and Asset Analysis, Probability and Statistical Maths, Risk Theory(RProgram), Stochastic Processes(R-Program), Statistical Modelling(R and SPSS Programs), Survival Models, Time Series(R-Program).

**SECONDARY EDUCATION**

# St. Michael’s College, Enniskillen, Co. Fermanagh Sep 2005 - June 2012

**A-Level**

Business Studies, Government & Politics, Mathematics (**A** in Mathematics)

**GCSE**

3 **A\***’s, 4**A**’s and 2**B**’s (to include **A\*** in Business Studies, **A** in Mathematics, English Literature and English Language)

# MEMBERSHIPS AND INTERESTS

* Member of CFA Society Ireland.
* Member of the Heriot Watt Actuarial Society and also the Trading & Investment Society.
* Member of the St. Michael’s College Cross Country and Soccer teams. Enthusiastic squash and soccer player; taking part in multiple five a side sessions per week. Currently an avid half marathon runner.
* Committed guitar player. Attained a personal goal of performing live for years and being part of several bands.
* Volunteer for Marie Curie Cancer Research as well Bright Eyes Animal Sanctuary in Co. Fermanagh, Northern Ireland.

# REFERENCES available on request

I am pursuing the opportunity to exploit my interest in the securities market and develop myself within the investment industry. I desire a fresh start and new challenges to fulfill my career aspirations and to further develop my existing skillset.

Having studied Actuarial Science at Heriot Watt University in Edinburgh, I was drawn to modules that were related to Investments. In particular my favorite modules were Portfolio Management and Derivative Finance, hence I moved from the insurance area towards investments. After graduating in June 2016, I am currently an analyst, working in the performance area at Fidelity Investments. In order to increase my theoretical understanding of advanced investment and finance concepts, I sat CFA Level 1 exam in December 2017. Coupled with this is a desire for a professional environment more in line with investment management and a shift away from investment operations. Although I am studying for professional exams, I am seeking an opportunity to be in an environment that encourages such growth through its