



Simon Vega

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SUMMARY

Detail-oriented finance graduate passionate about contributing to successful financial operations. Extensive knowledge of accounting principles combined with hands-on experience in fund accounting through academic projects. Demonstrated aptitude for managing multiple tasks efficiently and meeting deadlines amid pressure. Proven skills in utilizing Microsoft Office tools for financial reporting, analysis, and data verification. Eager to join a dynamic team at Acara Financial Services and support essential processes connected to commingled investment portfolios, ensuring accuracy and adherence to industry standards.

EDUCATION

Bachelor's Degree in Finance
University of Massachusetts Amherst GPA: 3.8
Coursework: Financial Accounting, Investment Analysis, Corporate Finance, Portfolio Management

2026
Amherst, MA

TECHNICAL SKILLS

- Accounting Software:** QuickBooks, MS Excel, Yardi
- Office Tools:** Microsoft Word, PowerPoint, Outlook
- Financial Modeling:** Excel Models, NPV Analysis, Forecasting Techniques
- Data Analysis:** Excel Formulas, Pivot Tables, Power BI
- Regulatory Compliance:** GAAP, IFRS, SEC Guidelines
- Project Management Software:** Asana, Trello, JIRA
- Collaboration Tools:** Zoom, Slack, Microsoft Teams
- Presentation Software:** PowerPoint, Google Slides, Canva
- Spreadsheet Applications:** MS Excel, Google Sheets, Airtable
- Valuation Techniques:** Discounted Cash Flow, Comparable Company Analysis, Precedent Transactions

SKILLS

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|----------------------|-----------------------|------------------------|------------------------|
| • Financial Analysis | • Problem Solving | • Expense Tracking | • Risk Mitigation |
| • Fund Accounting | • Time Management | • Valuation Inquiries | • Reporting Accuracy |
| • Microsoft Office | • Cash Management | • Accounting Standards | • Investment Valuation |
| • Data Verification | • Transaction Entries | • Process Improvement | |

EXPERIENCE

Fund Accounting Intern
University Project
Provided specialized accounting support for simulated commingled investment portfolios while gaining practical experience in fund accounting technology. Collaborated with teammates to execute net asset value calculations, ensuring meticulous treatment of transactions and expense tracking.

- Assisted with the preparation and timely delivery of daily accounting reports, aligning with department quality standards.
- Acted as the primary contact for inquiries relating to derivative valuations, clarifying information when discrepancies arose.
- Identified anomalies and communicated effectively to minimize operational risks while enhancing overall process efficiency.
- Contributed insights during management reporting regarding past dues, cash breaks, and reconciliation challenges.
- Championing process improvements led to increased individual productivity and collaborative successes within the team.
- Fostered cross-department communication, ensuring swift resolution of issues impacting accounting deliverables.

June 2025 – August 2025
Amherst, MA

Financial Analysis Assistant
University Project
Supported various academic projects focused on financial analysis, cultivating essential skills through real-world simulations and team collaborations. Gained exposure to financial software while working alongside peers to analyze investment data effectively.

- Conducted thorough data verification processes, contributing to accurate reporting across project deliverables.

January 2025 – May 2025
Amherst, MA

- Enhanced problem-solving techniques by collaborating with classmates to reconcile discrepancies in financial datasets.
- Presented findings and insights clearly during class projects, actively promoting discussions on financial trends.
- Engaged in initiatives geared towards streamlining workflows, showcasing proactivity in driving process enhancements.
- Identified opportunities for improvement after conducting comprehensive financial analyses, benefitting group outcomes.
- Participated in round-table discussions focused on market analysis, offering applicable perspectives based on research.

LEADERSHIP & AWARDS

- Dean's List, University of Massachusetts Amherst, Fall 2024 and Spring 2025
- Winner, UMass Finance Case Competition, 2025

CERTIFICATIONS

- Microsoft Office Specialist Certification 📅 2025
- Fundamentals of Finance Certificate 📅 2025

PROFESSIONAL AFFILIATIONS

- Member, Finance Club, University of Massachusetts Amherst
- Volunteer, Financial Literacy Program, local community center

LANGUAGES

- English (Native)
- Spanish (Intermediate)

ADDITIONAL INFORMATION

Work Status : Authorized to work in United States. No sponsorship required.

REFERENCES

AVAILABLE ON REQUEST