

# Vardhan Shah

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## EDUCATION

**The University of Texas at Dallas, USA, Master of Science in Finance (GPA: 3.95/4.00)** **May 2025**  
Coursework: Investment analysis, Financial Regulations, Portfolio Review and Wealth Distribution, Financial Modeling and Analytics

**Gujarat University, India, Master of Commerce (Major: Accounting | GPA: 3.40/4.00)** **June 2023**  
Coursework: Financial Planning and Budgeting, Financial Statement Analysis, Tax Planning and Compliance, Financial Markets

**Gujarat University, India, Bachelor of Commerce (Major: Advanced Statistics | GPA: 3.57/4.00)** **June 2021**  
Coursework: Quantitative methods for asset allocation, Investment Performance measurement, Risk Analysis and Portfolio Optimization

## LICENSES, CERTIFICATIONS AND SKILLS

Licenses: **CFA Level 3 candidate, Certified Financial Planner (CFP)**  
Certifications: Financial Modeling and Valuation (A Simple Model), Bloomberg Market Concepts, Refinitiv Datastream, Refinitiv Workspace, FactSet: Core Concept, S&P Capital IQ  
Software: MS Office, Advanced MS Excel, Bloomberg, Morningstar Direct, MoneyGuide Pro, Wealthbox CRM, Schwab Advisor Services, Orion, Tableau, LSEG, Holisti Plan, R Programming

## PROFESSIONAL EXPERIENCE

**Paces Ferry Wealth Advisors LLC: Financial Planning Intern, USA** **May 2024 – Aug 2024**

- Assisted advisors in 20 client meeting preparation to gain insights into client preferences and behavior to tailor financial plans.
- Adjusted financial budgets for unique needs of clients through rebalancing and diversification for maximization of growth.
- Executed 15 trades for clients to raise cash and strategically reallocate assets in portfolios based on individual risk preferences
- Performed detailed analysis to understand client behavior for customized solutions to support advisors in 7 client meetings

**Morningstar India Private Limited: Research Analyst, India** **Jul 2022 – Nov 2022**

- Performed fundamental analysis to process financial metrics in the Morningstar software to increase institutional efficiency.
- Researched market trends and summarized 150+ financial reports to forecast business revenue and highlight potential risks.
- Collaborated with profit metrics team to normalize EAT from the core operations of 75+ international and domestic firms.
- Assessed company valuations using key financial indicators to provide actionable insights for optimizing resource allocation.

## ORGANIZATIONAL EXPERIENCE

**JSOM Finance Lab: Finance Lab Manager, University of Texas at Dallas** **Aug 2024 – Present**  
**Graduate Teaching Assistant, University of Texas at Dallas** **Jan 2024 – May 2024**  
**Graduate Student Assistant, University of Texas at Dallas** **Sep 2023 – Dec 2023**

- Tutored 100+ undergraduate students to conceptualize fundamentals of Business Finance and Investment Management.
- Led and organized 'Financial Hackathon' overseeing all aspects to ensure smooth implementation for 170 participants.
- Collaborated with Quant Finance Club for conducting 6 bootcamps to introduce financial markets and derivatives trading.
- Conducted 4 interviews featuring various financial experts delving into dynamic evolution shaping the financial landscape.

## ACADEMIC PROJECTS

### **Financial Modeling & Portfolio Analysis: Real Estate and Healthcare Industry**

- Performed in-depth analysis of 10 stocks in real estate and health sectors using market capitalization and operating margin.
- Utilized portfolio theory to construct portfolios considering optimal weights achieving a 14.87% return and 1.98 Sharpe ratio.
- Employed hypothesis tests and regression models to refine risk evaluation and model reliability to showcase enhancements.

### **Derivative Option Pricing Model**

- Developed an option pricing model by utilizing option greeks to determine the optimal exercise point for non-qualified options.
- Incorporated liquidity goals and risk aversion levels tailored to individual financial needs to enhance liquidity planning.
- Measured option profitability by comparing intrinsic value and time value with the market price assuming a 10-year maturity.

### **Private Equity Cash Flow Financial Modeling**

- Engaged with private equity firms to gather insights for capital calls and analyze trends on distribution patterns by the fund.
- Observed 80% of the committed capital called by the fund in the first year with an average return of 14%-22% at the exit.
- Identified distributions initiating from the third year with minimal recallable distributions and stability in bond-exposed funds.

## VOLUNTEER EXPERIENCE

- Facilitated smooth conduct of the event at Texas ACG Capital Connection to gain insights into private equity financing deals.
- Handled the registration desk and assisted employers in an effective recruitment process at the UTD Spring 2024 Career fair.
- Engaged in the selection of committee and aided professionals in conducting debate sessions at a Model United Nations event.