

Ivan Serdarov

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PROFESSIONAL SUMMARY

Driven and analytical Finance and Business Analytics Master's candidate with a robust foundation in financial modeling, investment strategies, and data-driven decision-making. Possesses a diverse background in banking operations, sales management, and healthcare finance. Skilled in leveraging advanced tools such as Python, SQL, and Tableau to extract insights and optimize business performance. Seeking to apply academic expertise and practical experience in a challenging financial analyst or investment role.

WORK EXPERIENCE

Operations and Sales Manager La-di-da | Rehoboth Beach, DE May 2024 -September 2024

- Drove sales that generated over \$100,000 in revenue for the business during its inaugural summer season.
- Streamlined daily operations and inventory management, ensuring all aspects from receiving to counts were efficient and accurate.
- Analyzed fashion trends for summer and fall, guiding purchasing decisions to ensure a relevant product assortment and enhance customer appeal.
- Developed and executed strategic sales plans that exceeded revenue targets.
- Elevated the customer shopping experience by overseeing visual merchandising and optimizing store layouts.

Financial Consultant Intern / Accountant Prine Health | Mineola, New York. May 2023 – October 2023

- Ensured compliance of financial and tax statements for over 30 healthcare professionals, identifying and correcting a \$7,000 miscalculation, which earned recognition for exceptional attention to detail and contributed to a 95% accuracy rate in financial reporting
- Conducted comprehensive analyses of over 15 investment opportunities, delivering actionable insights that supported strategic decision-making, resulting in a 20% increase in overall operational performance
- Developed tailored, tax-efficient financial strategies for clients, optimizing their financial health and achieving an average tax savings of 12%, significantly enhancing client satisfaction and retention

Private Banking Intern First Investment Bank | Varna, Bulgaria May 2022 – September 2022

- Pioneered the evaluation of client financial profiles for loan and mortgage underwriting, processing over 50 applications to assess creditworthiness.
- Secured an average of 15 client meetings per month by creating and delivering financial presentations on loan products.
- Streamlined the client onboarding process, ensuring compliance with regulatory requirements and reducing documentation time by 20%.
- Conducted targeted market research to identify trends in commercial lending, informing the development of 3 new loan offerings.

PROJECTS

[Cloud Data Warehousing with Snowflake](#) Implemented a secure cloud data warehouse with RBAC, performing SQL analytics to identify "at-risk" campuses and reduce student churn.

[Hotel Booking Demand Analysis](#) Performed statistical hypothesis testing (Python/Pandas) on cancellation rates, recommending a segmented deposit strategy to mitigate 41% churn in city hotels.

[Litecoin Strategic Partnership](#) Analysis Evaluated Litecoin's competitive positioning against Bitcoin/Ethereum and developed adoption strategies for institutional investors (Morgan Stanley, Vanguard).

[AI for Sports Entertainment Strategy \(UFC\)](#) Designed an AI-driven fan engagement strategy featuring a VR Arena Pass and predictive Fight Companion App to boost revenue.

[Stablecoins and PayPal's Fintech Role](#) Analyzed the strategic impact of PayPal's stablecoin (PYUSD) and evaluated fiat-backed vs. algorithmic stablecoin models for mass adoption.

[Investment Policy Statement](#) outlines the strategic plan for managing a \$500,000 portfolio with a conservative approach that balances stable income generation and modest growth through a carefully structured mix of equities and fixed-income investments.

[Equity Research](#) Developed a comprehensive equity report on Philip Morris International, providing a buy recommendation based on detailed financial analysis and market trends in the evolving tobacco industry

[Equity Research: Bristol Myers Squibb](#) Built a DCF and Holt-Winters revenue model to issue a "Buy" recommendation (\$75 target), valuing the "Growth Portfolio" impact on patent cliff mitigation.

[DCF Valuation of One Spa World](#) Created a discounted cash flow (DCF) model for One Spa World, providing financial valuation insights to support investment decisions

[Business Challenge Hedge Fund Pitch](#) raised \$300 million to invest in event-driven opportunities in cybersecurity, AI, and renewable energy for superior returns

[Amazon Financial Analysis & Valuation](#) Built a 5-year DCF model and forecasted financial statements (IS, BS, CF) through 2028, utilizing WACC and ratio analysis to determine intrinsic value.

[Data Extraction With SQL](#) Extracted and analyzed client investment portfolio data using SQL, improving data-driven decision-making and reporting efficiency

[Meta \(Oculus\) Strategic Marketing Plan](#) Created a marketing strategy and budget for Oculus Quest 2 targeting Gen Z to drive adoption.

EDUCATION

Master of Science in Finance and Business Analytics

April 2026

Hult International Business School | Boston, Massachusetts

Recipient of Future Leader Scholarship, and Global Professional Scholarship

Relevant Courses:

- **Finance & Investment:** Corporate Finance, Financial Management, Investments, Portfolio Management, Mergers & Acquisitions, Global Financial Markets, Cryptocurrency, Fintech.
- **Business Analytics:** Python for Data Analysts, Data Extraction & Visualization, Advanced Business Statistics, AI for Sports Entertainment, AI and Big Data, Business Analysis with Structured Data, Data Management & SQL.
- **Strategy & Management:** Strategic Risk Management, Cost & Managerial Analysis, Financial Accounting, Business Challenges (Financial Analysis & Impact), Teamwork & Collaboration.

Bachelor of Science in Finance

May 2024

St. John's University, The Peter J. Tobin College of Business | New York, NY

Recipient of Presidential Scholarship;

Relevant Courses:

- **Advanced Finance:** Applications: Machine Learning in Finance, Tech & Analysis for Finance, Fixed Income Markets & Instruments, Real Estate Finance & Investments, Commercial Banking, Corporate Financial Analysis.
- **Economics & Quant:** Macroeconomic Theory, Modern Statistics II, Calculus with Business Applications, Principles of Risk Management.
- **Business Core:** Strategic Management, Managing Operations, Law in a Business Environment, Principles of Marketing, Fundamentals of Accounting.

ADDITIONAL INFORMATION

Technologies: Advanced Excel, Python, Power Bi, Tableau, Word, PowerPoint, Canva, Bloomberg Terminal, R, SQL, LLMs, Snowflake

Certificates: [Bloomberg Market Concepts \(BMC\)](#), [Financial Modeling in Excel](#), [Intermediate SQL](#), [Joining Data in SQL](#), [Introduction to Python](#), [Introduction to Statistics in Python](#), [Introduction to Statistics in Google Sheets](#), [Introduction to Financial Accounting](#)

Skills: Data Cleaning, Data Visualization, Financial Modeling and Valuation, and Financial Statement Analysis

Language: Fluent in English, Native in Bulgarian, Intermediate in Russian, Beginner in German, and Spanish