

Naim Shamash

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SUMMARY

Finance professional with experience in financial modeling, securities analysis, forecasting, and portfolio management. Skilled in financial analysis and reconciliation.

PROFESSIONAL EXPERIENCE

Pomerantz LLP

New York, NY

Finance Analyst Intern

April 2025 – September 2025

- Quantified investment losses across 10+ securities litigation cases using FIFO and LIFO modeling of transaction-level data, supporting damages analyses tied to multi-million-dollar settlements.
- Researched fund performance and market exposure, translating quantitative and qualitative findings into portfolio-level KPI reporting for senior attorneys.
- Reconciled transaction records to court filings and source data to validate loss calculations and improve reporting accuracy.

Independent Collectibles Resale Business

Queens, NY

Owner and Operator

2018 – Present

- Built and operated a self-funded collectibles resale business generating \$21K in annual sales, using live market data to forecast demand and optimize pricing.
- Increased repeat-customer engagement by 10% through inventory management and targeted digital marketing.

INVESTMENT & VALUATION PROJECTS

Bank of America – Private Banker Virtual Job Simulation (Forage)

July 2026

- Managed hypothetical client relationships, drafting professional communications and aligning goals like retirement planning and sustainable investing with tailored solutions.

Citi Bank - Investment Banking Virtual Job Simulation (Forage)

December 2025

- Built a target company profile, a five-year financial projection in Excel, a comparable company analysis, and an internal summary report as a buy-side analyst on a hypothetical retail acquisition.

Hillel Endowment — Student Portfolio Manager

January 2022 – December 2024

- Led a 10-person student investment team in risk analysis and diversified asset allocation, delivered a 7.5% average annual return over two years; reported results to faculty advisors.

AmplifyME — Asset & Wealth Management Simulation

October 2024

- Ranked top 10 of 150 global participants, generating a 6.4% return on a \$15M simulated equity portfolio through systematic risk-return analysis and active monitoring.

AmplifyME — Merger & Acquisition Simulation

February 2024

- Placed 3rd of 10 universities by building Excel-based DCF, comparable companies, and LBO models and delivering a full strategic and financial impact assessment.

LEADERSHIP & ACTIVITIES

Zicklin Undergraduate Tax Society

January 2021 – September 2024

- Led a 10-person executive team to deliver 6+ recruiting events per semester, growing active membership by 215+ students.
- Managed treasury operations including budgeting and forecasting, maintaining budget oversight to fund all club events.

SKILLS

Technical: Financial Modeling (DCF, Comps, LBO) | Forecasting & Budgeting | Budget-to-Actual Variance Analysis | FIFO/LIFO Securities Modeling | Financial Data Analysis | Risk Analysis | AR Reconciliation | Month-End Close | Due Diligence | KPI & Portfolio Reporting

Software: Excel (XLOOKUP, Macros, Pivot Tables) | Word | PowerPoint | Access | Salesforce

EDUCATION

Baruch College, Zicklin School of Business

New York, NY

BBA in Finance | Minor in Mathematics

Graduated December 2024