

SONIA BALANI

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EDUCATION

University of Waterloo

Master of Accounting (MAcc)

Jan – Aug 2023

Bachelor of Accounting and Financial Management, Honours, Co-op

Sept 2018 – Dec 2022

- Cumulative GPA: 85%, Dean's Honours List

WORK EXPERIENCE

LoyaltyOne (Air Miles)

Internal Audit Analyst

Sept 2021 – Apr 2022

- Executed planning, testing, and reporting procedures for financial and operational audit engagements
- Identified control deficiencies within the business and communicated issues in audit reports for management
- Increased efficiency by 50% of testing procedures by automating process to screen for potentially suspicious transactions and summarize data through utilizing VBA Macros and MS Excel formulas
- Created and delivered PowerPoint presentation on maintaining compliance with CASL to over 60 key stakeholders

PricewaterhouseCoopers LLP (PwC)

Assurance Associate

Jan – Apr 2021

- Prepared over 200 working papers during audits for Real Estate, Mining, Technology and NPO clients
- Performed tests of detail, tests of control and substantive analytical procedures on accounts such as revenue, accounts receivable, accounts payable, PPE, and cash by leveraging analytical and problem-solving skills
- Maintained excellent relationships with clients through effective communication to perform audit procedures

Office of the Superintendent of Financial Institutions (OSFI)

Financial Accounting Intern

Jan – Apr 2020

- Prepared multiple quarterly Life Insurance Capital Adequacy Testing (LICAT) summary reports by analyzing over 50 company datasets to highlight market trends and key drivers behind capital changes for senior management
- Demonstrated financial statement analysis and Microsoft Excel skills by writing over 700 validation rules to increase the accuracy rate for 70% of quarterly Minimum Capital Test (MCT) statement data received from insurers

EXTRACURRICULAR EXPERIENCE

CFA Institute Research Challenge

Competitor, 1st place at CFA Society Toronto Local Finals

Nov 2022 – Apr 2023

- Developed an investment recommendation for Payfare Inc. with a team of 4 students by leveraging analytical skills

Student Investment Fund (SIF)

Senior Analyst

Sept 2020 – Aug 2021

- Collaborated with a team of 35 students to manage a C\$450,000 portfolio of Canadian and U.S. equities
- Presented investment recommendations on equities through building financial models, conducting due diligence, performing company research, and evaluating industry trends

PROJECTS

Grocerify (TechNova Hackathon)

figma.com/Grocerify

Aug 2022

- Designed an app using Figma which facilitates sustainable grocery shopping and placed 1st out of 41 teams

Tweeting Drives the Stock Market ft. Elon Musk and Tesla

soniabalani.github.io/twitterproject.html

Jul 2019

- Utilized SQL queries and a weighted sum formula to rank the top 20 days where the intersection of Tesla's highest stock price movements and most activity with Elon Musk's tweets exists
- Concluded with 65% confidence that there is a positive correlation between tweeting and the movement of the stock

SKILLS, ACTIVITIES & INTERESTS

Skills: MS Office (Word, Excel, PowerPoint), SQL, Tableau, Alteryx, VBA Macros, Figma, Power BI, HTML, CSS

Activities and Interests: UW DECA (Team Member), Student Venture Fund (Analyst), Personal Investing and Finance