Nour Abdelbaki, CFA

Financial Analysis | Stakeholder Management | Investment Consulting

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Available immediately

PROFILE

Finance professional with experience in investment consulting, portfolio management and financial analysis. Skilled in structured problem solving, stakeholder management and translating complex financial information into actionable recommendations that support business decisions. Having spent several years evaluating investment opportunities and supporting portfolio decisions, I am now motivated to apply these capabilities closer to business performance, operational decision-making and long-term growth. I combine a structured and independent working style with strong communication skills and a track record of effective collaboration across teams, consistently rated "excellent" across performance reviews.

PROFESSIONAL EXPERIENCE

Financial Consultant – INAIA, Frankfurt 10/2025 – 03/2026

Financial advisory firm for retail investors, specializing in values-based investment planning in precious metals and ETFs.

- **Client advisory:** delivered values-based investment guidance to 20+ retail clients, supporting informed decisions on precious metals and ETF products, achieving a 40% conversion rate by guiding clients through the full advisory journey from goal setting to product selection.
- **Retention:** protected revenue at risk by resolving client uncertainties and preventing multiple planned cancellations through clear, structured clarification of product details.
- **Digital tools & process:** contributed to the development of a digital advisory tool (input on risk classification) and supported the company's CRM migration from HubSpot to Zoho.

Lead Associate, Investments – Willis Towers Watson Investment, Frankfurt 04/2021 – 09/2025

Institutional investment consulting; managed delegated multi-asset mandates on behalf of institutional clients, in close coordination with KVGs, asset managers, and custodians.

- **Portfolio management:** managed delegated multi-asset institutional portfolios (equities, bonds, real assets, private markets) with more than €1.5bn in assets across 6 institutional clients, coordinating with KVGs and asset managers on strategy, reporting, and operational alignment.
- **Technology rollout:** served as a main point of contact for the 1-year SimCorp Dimension implementation, coordinating deliverables across the German team, leading UAT testing, and liaising weekly with the project manager and stakeholders across Trade Management, Portfolio Management, Compliance, and Operations.
- **Training & change management:** designed and coordinated SimCorp onboarding and training for the German team in partnership with the global training lead, supporting a smooth transition from legacy tools.
- **ESG & sustainability:** developed an ESG report and carbon-reduction roadmap for client portfolios; one client went on to win an industry award for their ESG strategy.
- **Client onboarding:** led end-to-end onboarding and operational set-up of two institutional clients with their KVG.
- **Process documentation:** co-authored a team-wide documentation initiative covering the full portfolio management lifecycle (planning, monitoring, trading, audit requirements), producing both a detailed

reference document and a simplified visual presentation to improve transparency and knowledge continuity.

Working Student, Global Treasury – SAP, Walldorf 07/2019 – 12/2019

Supported the Global Treasury team on quantitative analysis, bank administration, and compliance activities across SAP's global entities.

- **Treasury analysis:** prepared internal reports on executive compensation programs, FX exposure, and credit ratings to support Treasury decision-making.
- **Administration & compliance:** managed bank account administration, KYC documentation, and Electronic Payment System connectivity; supported SOX audit preparation by reviewing and updating physical and electronic access controls.
- **Knowledge sharing:** authored internal process documentation for intercompany financing requests and contributed regularly to the Global Treasury newsletter.

Intern, Finance & Accounting Guidelines – Daimler, Stuttgart 06/2018 – 09/2018

Supported the Finance & Accounting Guidelines team in developing and rolling out internal policies across Daimler's global group entities.

- **Policy rollout:** supported the global implementation of an accounting guideline on outgoing payments, including impact analysis on contract management processes for procurement contracts.
- **Process design:** co-developed a decision-tree concept to standardize guideline application across group entities, plus a stakeholder-analysis framework and templates for future policy rollouts.
- **Coordination:** managed SharePoint-based information platforms and coordinated translation workflows for multilingual policy documentation.

Intern, Mergers & Acquisitions – UniCredit, Munich 01/2018 – 04/2018

Supported the M&A team with research, valuation, and pitch materials for live translations.

- **Valuation support:** supported company valuations using trading multiples and the discounted cash flow (DCF) method for live M&A transactions.
- **Deal support:** conducted market and company research to build investor and target long lists, and contributed to pitch presentations and information memoranda.

EDUCATION

CFA Charterholder – CFA Institute 03/2024 – Present

Mannheim Master in Management – Mannheim University 09/2018 – 03/2021

B.Sc. International Business – Reutlingen University 03/2015 – 06/2018

SKILLS & LANGUAGES

- Financial Analysis & Modelling
- Stakeholder & Relationship Management
- Advanced MS Excel & PowerPoint
- Structured Problem Solving
- Cross-functional Collaboration
- Process Improvement & Controls

Languages: German (fluent), English (fluent), Arabic (fluent), French (intermediate)