

TAZREEN ISLAM

Houston, TX | Open to Relocation

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PROFESSIONAL SUMMARY

A May 2025 B.B.A. Finance graduate applying analytical training to real business problems. Hands-on experience across financial operations, investment client operations, business analysis, and data-driven decision support in high-volume, cross-functional environments — with independent portfolio projects in financial modeling, valuation, and forecasting that refresh and extend that Finance education.

EXPERIENCE

Digitalized Elevation

Remote

Business Operations & Analytics Manager

June 2023 – February 2026

Career transition, February 2026 – September 2026, preceded the Partner, Digital Strategy & Web Development role below.

- Built and maintained Excel-based KPI dashboards and reporting systems to track financial performance and business metrics, improving pipeline visibility by 300% across revenue and performance reporting.
- Performed ongoing data validation, discrepancy analysis, and trend identification across CRM and operational systems, ensuring data integrity and accuracy across 10+ workflows.
- Analyzed unit economics — including client acquisition cost, service delivery time, and contribution margin — to identify key performance drivers, improving projected gross margin by 18%.
- Automated reporting and workflow processes, reducing manual errors and supporting 85% year-over-year revenue growth.

Partner, Digital Strategy & Web Development

September 2026 – Present

- Leading premium website development and digital strategy for client engagements.
- Directing marketing strategy, SEO, and brand/content direction.
- Overseeing business operations, client relationships, and project delivery.

Victory Capital

San Antonio, TX · On-site · Full-time

Investment Client Engagement Analyst

May 2025 – September 2025

- Executed and validated high-volume financial transactions and data records — including ACAT transfers, rollovers, and estate distributions — supporting account movements up to \$1M per client account with zero regulatory deficiencies.
- Reduced NIGO reject rates by 50% by implementing pre-submission data validation controls and resolving documentation discrepancies prior to operational escalation.
- Streamlined financial data workflows across Salesforce, UKG, Relius, TACC, and Genesys, accelerating estate settlements by 30% and increasing transaction throughput by 25%.
- Managed 70–100 daily client and stakeholder inquiries related to account servicing, asset transfers, and financial documentation while maintaining SEC and FINRA compliance standards and audit-ready records.

Swarovski

San Antonio, TX · On-site · Full-time

Senior Luxury Sales Strategist

June 2022 – August 2024

- Generated \$100K+ in personal revenue within four months, consistently ranking among the top two performers in store.
- Managed and cultivated 400+ active client relationships, increasing average transaction value 30%+ and driving a 65%+ repeat purchase rate.
- Expanded loyalty membership enrollment 50%+ through personalized client outreach and relationship management.
- Mentored a team of approximately 6–7 associates following promotion to a full-time role, maintaining zero cash variances through disciplined operational controls.

The University of Texas at San Antonio

San Antonio, TX · On-site · Internship

HR Operations Analyst

May 2023 – October 2023

- Processed and verified 2,000+ HR records weekly through structured data entry and digital filing systems while maintaining zero compliance violations or audit findings.
- Reorganized digital filing infrastructure and streamlined payroll verification workflows, reducing document retrieval time 50%+ and processing discrepancies 30%+.
- Implemented standardized intake tracking processes, reducing inquiry backlog 40%+ and contributing to 100% audit compliance.

Problem Solving Company

Houston, TX · Remote · Freelance

Financial Strategy Consultant

January 2020 – December 2020

- Conducted financial analysis and modeling to evaluate revenue performance, cost structures, and growth strategies, increasing consultation revenue by 40%.
- Developed structured financial models and data visualizations to support data-driven decision-making, improving conversion rates by 30%.
- Analyzed capital markets trends and produced financial strategy content generating 250K+ impressions, strengthening market positioning.

EDUCATION

Bachelor of Business Administration — Finance

The University of Texas at San Antonio · August 2021 – May 2025

Honors: Dean's List (Spring 2022), Honor Roll (Fall 2023)

Relevant Coursework: Intermediate Corporate Finance, Debt & Derivative Markets, Investment Principles, Financial Modeling

SELECTED SKILLS

Financial Analysis & Decision Support

Financial Analysis · Pricing & Scenario Analysis · ROI & Break-Even Analysis · Trend & Variance Analysis · Financial Modeling (Excel-based) · Data-Driven Decision Making

Reporting & Data

KPI Tracking & Dashboarding · Executive & Business Intelligence Reporting · Data Validation & Reconciliation · Discrepancy Analysis · Data Integrity · Large Dataset Analysis

Financial & Business Operations

Financial Operations · SEC & FINRA-Compliant Workflows · Audit & Documentation Controls · Process Optimization & Workflow Standardization · Operational Analytics · Cross-Functional Collaboration

Analytical Tools

Microsoft Excel (Advanced) · Power BI · Tableau · SQL (Foundational) · Google Sheets

Business Systems

Salesforce CRM · Relius · TACC · Genesys Cloud · UKG · PeopleSoft · HRIS · QuickBooks · Google Workspace

SELECTED PROJECT

Data-Driven Pricing & Market Expansion Analysis — Digitalized Elevation

- Built Excel-based financial models using pivot tables, lookups, and structured datasets to analyze revenue performance and forecast outcomes.
- Conducted competitive benchmarking across 10+ firms, evaluating pricing strategies and total addressable market.
- Developed ROI projections for service-line expansion, improving projected margins by 18%.