

Paul Holzman

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OBJECTIVE

To utilise my skills and experience to secure a position in the finance department of a progressive organisation focused on employee development.

PERSONAL PROFILE

An accurate, hands-on, open-minded individual with over five years' commercial experience working across a variety of industries. Recognised for excellent numerical and lateral thinking capabilities, coupled with strong analytical and problem solving skills. A proactive, self-starter with energy and enthusiasm to succeed. Highly people-oriented and regarded by others as imaginative, a realist and diplomat. Currently studying towards RPE and a BComm degree.

KEY SKILLS

- Logical thinking with exceptional numerical abilities
- Good planning and administration skills
- A strong team player that works well in a team and on own initiative
- Excellent communication and interpersonal skills, able to effectively communicate at all levels
- Highly capable of learning new skills and processes
- Computer literate: proficient user of Microsoft Office – Word, Excel and Office; Pastel; SAP; also studied computer programming.

EMPLOYMENT HISTORY

Standard Bank

(March 2008 - Current)

Contractor

- Worked in the procurement division, controlled all the administrative affairs with regards to the buying for branches countrywide, worked on the SAP system

Share Direct

(Sep 2007 – Nov 2007)

Consultant

- Consultant for a stock market related business involved in Stock Market education with regard to trading
- Trained prospective clients on various Stock Trading packages and assisted with analysing the market
- Attended lectures on Futures/Equities/Derivatives and Forex trading, gaining an extensive insight into all facets of the market
- Monitored the market to the extent of 'hot buy and sell' options according to mathematical trading methodology. Utilised numerous graphs available through the company's software, focusing predominantly on Equities and Futures.

First National Trust (2 positions held)

(Sep 2005-Sep 2007)

Trade Support

- Solely responsible for clearing and settlement of a stock called Aplitec which delisted from JSE and now trades on NASDAQ exchange in the USA
- Liaised with stockbroking firms including JP Morgan, Merrill Lynch and Morgan Stanley through the whole process. It was very high risk and attention-to-detail was paramount to

- avoid huge losses; millions of USD changed hands so accuracy was vital
- Developed a good knowledge of Strate, JSE, Brokerage matters/Script and trading
- High level of accountability was in place coupled with ability of conflict management and negotiating with regard to pricing dilemmas
- Scrutinised the status of trades and the stock price, and effectively logged and managed the Aplitec accounts
- Promoted to the Trusts and TAMS department in September 2006

Support/Back Office, Asset Management & Trusts Department

- Compiled Trusts cash flows and capital distributions
- Monitored and reviewed accounts
- Sorted out the trusts tax and implications thereof
- Maintained the wellbeing of beneficiaries and trust financially as a whole

Sasol

(Feb 2005-Aug 2005)

Contractor

- Assigned to an internal audit team mandated to ensure compliance with the Customs and Excise Duty Act
- Ensured that all documentation relating to the export of certain products had been duly completed and met the audit requirements of the South African Revenue Service

Nedcor

(Sep 2004 – Feb 2005)

Contractor, Corporate/Investment Banking

- Working in Treasury dealing with reconciliations of investments and doing interest adjustments

Georgeson Shareholder Corporation

(Feb 2003 - Aug 2004)

Share Consultant, demutualisations (contract)

- Assisted companies with mergers, acquisitions and takeovers and deduced how these corporate actions would ultimately affect the company share price
- Liaised with customers in the UK
- Sold and purchased shares on behalf of customers, many of which were large corporations
- Provided advice and informed shareholders of the demutualisation process and the necessary actions that needed to be followed
- Explained procedures to shareholders pertaining to the allotment of their shareholding

First Choice Carpets

(March 2002 - Jan 2003)

Planning Analyst

- Calculated the amount of material required to fully carpet or floor a house, as per customer requirements
- Optimised the use of carpets or wood, effectively reducing costs for both the client and the company
- Won several deals from the competition through effective quantitative planning
- Assessed prospective customer needs and assisted them throughout the selection process, providing advice and information on a wide range of carpets or wood
- Handled general administrative duties, including dealing with incoming calls and general customer queries

1st Contact, London
Tax Consultant

(2001)

- Provided comprehensive financial services to the working traveller, explaining general tax issues and calculating tax rebates
- Informed and guided customers on the process required to claim tax rebates

Clear Purple
Co-Partner

(2000 - 2001)

- Set up this web-development business from scratch, which included locating business premises
- Managed the day-to-day running of the business including providing customer quotations, dealing with queries and managing the company accounts
- Negotiated a rental agreement with the landlord, saving R20,000 per annum
- Designed advertisements and controlled the overall marketing of the business
- Provided IT services to a range of corporates, including data basing, web development, networking and programming.
- Established and built customer relationships
- Successfully designed and developed several websites for clients

Price Forbes:

(1997 - 1999)

Marketing & Administrative Assistant (Temporary Assignments)

- Handled premium payment plans for this corporate risk management consultancy
- Liaised with corporate customers, providing lending rate quotations
- Assessed profit margins and marketing of policy
- Analysed tenure of loans, establishing the creditworthiness of clients

ABSA & First National Bank
Enquiries Clerk / ATMs/Teller

(1993 - 1995)

EDUCATION

Bachelor of Commerce (BComm) Degree, University of South Africa	Ongoing
Subjects passed: 5	
Institute of financial markets, RPE (Stock Market)	Ongoing
Completed diplomas in Copy Righting and Sports Management	
Matric, Hilton College & Randpark High School	1991
Subjects included: Maths and Business Economics	