Daniel Foust

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EDUCATION

Chartered Financial Analyst (CFA Institute) **November 2025**

Clemson University **Clemson, SC**
Bachelor of Arts, Spanish & International Business *Class of 2019*
Minor in Financial Management

Universidad Blas Pascal **Córdoba, Argentina**
Study Abroad with Concentration in Spanish *Feb 2018 – June 2018*

WORK EXPERIENCE

Dimensional Fund Advisors **Charlotte, NC**
Portfolio Management Analyst *Aug 2024 - Present*

- Recommended and prepared FX trades to facilitate security purchases and sales in foreign markets
- Analyzed corporate actions, including tender offers and exercises of rights, to maximize fund returns
- Reviewed securities with significant price movements to determine underlying drivers and assess continued portfolio eligibility
- Recommended firm participation in secondary equity offerings after identifying they are typically priced at significant discounts to market value
- Led a project to identify merger targets with cash-like exposure, using price volatility analysis to reduce cash drag in portfolios
- Drove process improvements and automations using Excel, VBA, Python, and SQL

The Vanguard Group **Charlotte, NC**
Resource Planning Analyst *Feb 2023 - Aug 2024*

- Strategically allocated headcount resources between departments based on business need and departmental prioritization
- Analyzed historical call volumes, business initiatives, and seasonal trends to develop accurate workforce forecasts and ensure optimal staffing levels
- Collaborated with management, HR, and finance teams to strategize and implement recruitment plans
- Created Python and Excel based tools to optimize workforce utilization and availability

Workforce Management Analyst *Dec 2021 – Feb 2023*

- Developed and maintained short-term demand and capacity forecasting models for retail contact centers
- Provided analytical support to phone and operations groups to help them meet service goals
- Performed scenario modeling to assess the impact of business initiatives on the operational environment
- Collaborated with business leaders to provide insights to the past week and communicate the near-term operational plan

Investment Associate *Feb 2020 – Dec 2021*

- Provided personalized investment guidance to clients, empowering them to make informed decisions by explaining available investment options, risk profiles, and potential returns
- Facilitated seamless stock, ETF, and mutual fund trade execution for clients, ensuring accurate placement of orders and timely confirmations, enhancing overall satisfaction and trust in brokerage services.
- Cultivated strong client relationships through proactive communication and responsiveness, addressing inquiries promptly and resolving issues to maintain high levels of client satisfaction and retention.

ADDITIONAL INFORMATION

Skills:	Investment Analysis, Data Analysis, Process Automation & Tool Development, Problem Solving, Spanish Language, Peer Coaching
Computer:	Python, Excel, PowerPoint, Word, Minitab
Certifications:	SIE, FINRA Series 7 & 63
Interests:	Financial Markets, Investing, Reading, Surfing, Skiing