

# NIC POTGIETER, CPA

## ASSOCIATE

**P** +1 (345) 547-8726

**E** n.potgieter38@gmail.com

**A** George Town, KY

**W** [LinkedIn](#)

### OBJECTIVE

An organized and self-motivated **Chartered Professional Accountant** with a proven track record of providing high quality accounting services to a variety of industries including construction, oil and gas, manufacturing, retail and financial services. A strong team player with a special interest and aptitude in investment and performance analysis and providing recommendations to improve business processes and profitability, while remaining compliant with relevant accounting and business regulations.

### EXPERIENCE

#### **Associate – Alvarez & Marsal (Cayman Islands)**

June 2023 - Current

- Provide liquidation services and restructuring services to a wide variety of clients within the oil and gas industry and financial services; and
- Perform investigations for distressed companies with alleged fraud.

#### **Senior Auditor – Deloitte & Touche LLP (Cayman Islands)**

January 2022 – June 2023

- Lead, plan, and execute audits for hedge funds, venture capital funds, and private equity funds ranging from \$25M to \$4B AUM;
- Analyze financial performance of entities as a part of the audit risk assessment process;
- Perform substantive procedures on material balances identified during the risk assessment with a specific focus on valuation using a Bloomberg terminal and testing custody of various investment types such as fixed income, equities, derivatives, etc; and
- Review financial statements and provide comments and analysis of results with the client.

### EDUCATION

CPA Western School of Business  
**Chartered Professional Accountant**

MacEwan University  
**Bachelor of Commerce  
Major in Accounting**

### ON-GOING TRAINING

CFA Level I Candidate

### KEY SKILLS

- Project Management
- Attention to Detail
- Clear Communicator
- Customer Service
- High Quality Results
- Leadership & Team Building
- Ability to Learn Quickly

### LANGUAGES

- English
- Afrikaans

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### **Audit Manager – Metrix Group LLP (Canada)**

March 2021 – November 2021 (Permanent)

- Lead planning and year-end meetings with clients, providing findings on processes, controls, and ways to increase profitability;
- Prepared financial statements in accordance with IFRS, or Canadian GAAP for government and small business entities;
- Managed audit engagements with numerous staff members, ensuring audit budgets and timelines were met; and
- Reviewed junior staff work and provided constructive feedback.

### **Project Accountant – Midwest Pipelines Inc. (Canada)**

June 2020 – February 2021 (Contract)

- Prepared and analyzed weekly project costs and reported to upper management;
- Managed subcontracts and ensured invoices were being paid in accordance with the scope of work outlined in the contract; and
- Investigated billing and payroll discrepancies, reconciled to supporting documentation.

### **Associate – KBH Chartered Professional Accountants (Canada)**

September 2017 – April 2020 (Permanent)

- Completed CPA articling training at the above accredited CPA training office, specializing in audit and taxation.

## **SUPPLEMENTAL SKILLS**

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### **Microsoft Office**

- Expert in Excel (Pivot tables, Macros, Advanced formulas, etc.), Sharepoint, Power BI, Word, PowerPoint and Outlook

### **Stock Charting & Analysis**

- Proficient using TradingView (charting software), planning entry and exit points for investments, back testing investment strategies, and identifying value investments using technical and fundamental analysis.

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### HOBBIES

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#### Investing

- Research various equity and fixed income securities and invest personal savings using Interactive Brokers.

#### Reading

- Strong interest in books related to fundamental and technical analysis, investment strategies, charting, and portfolio management, etc.

#### Physical Activity

- Enjoy multi-day hiking in North and South America, running, and going to the gym on a frequent basis.