

Theo Mihell

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PROFESSIONAL SUMMARY

Client-facing finance professional with four years at Bloomberg LP serving institutional investors, combining direct RFP, RFI and DDQ production with advanced Excel-based analytics and deep working knowledge of financial statements and estimates. Delivers regular client training and led a workflow redesign that cut a daily equity process from 3-4 hours to ~10 minutes, a ~95% efficiency gain. Is completing a BSc (Hons) Finance and Investment Management (2:1) at the London Institute of Banking and Finance, due to complete in October 2026 alongside full-time employment. Now seeking to move into investor relations within global alternatives, where investor communication, fund reporting and data-driven insight sit at the centre of the role.

WORK EXPERIENCE

Equity Specialist, Analytics

2023-09 – present

Bloomberg LP, London, UK

- Resolved ~100 client queries per week for institutional and investment professionals, building a strong understanding of how portfolio managers and analysts use financial data in their daily work
- Delivered regular in-person and virtual training sessions, translating complex financial data and workflows for clients with different levels of expertise
- Led a full client process revamp, reducing a daily equity analysis task from 3-4 hours to ~10 minutes (~95% efficiency gain) through Excel automation and workflow optimisation
- Built Excel-based solutions using the Bloomberg API and BQL, enabling clients to automate custom reporting and analysis
- Maintained a Quality Control score above 96% and a resolve rate above 75% against a 70% department average, sustaining accuracy under high volume
- Served on the Bloomberg Apprentice Committee (2024-2025), planning cross-department events including a winter social with a £10,000 budget

CAMS Specialist

2022-09 – 2023-09

Bloomberg LP, London, UK

- Supported 10+ revenue-generating RFPs as the key liaison between sales and internal product and engineering teams, including projects valued up to £400k
- Gathered, validated and quality-checked technical content for proposal and due diligence responses, ensuring submissions met client requirements and deadlines
- Coordinated cross-functional project delivery to tight deadlines across multiple internal teams
- Worked with RFP and due diligence documentation in a regulated environment, giving direct experience of the documentation investors expect

EDUCATION

BSc (Hons) Finance and Investment Management

2023-01 – 2026-10

London Institute of Banking and Finance (LIBF), 2:1

Undergraduate degree in finance and investment management, completed alongside full-time employment at Bloomberg.

A-Levels (Sixth Form)

2020-09 – 2022-06

Kirkham Grammar School

Business Studies, Economics, Computer Science.

GCSEs

2015-09 – 2020-06

Kirkham Grammar School

10 GCSEs (grades 7–5) including Mathematics and English.

SKILLS

RFP & Sales Support	DOMAIN	Client Training & Delivery	SOFT
Financial Statements & Estimates	DOMAIN	Data Analysis	TECHNICAL
Customer Service	SOFT	Quality Control	TECHNICAL
Stakeholder Collaboration	SOFT	Project Coordination	SOFT
Bloomberg Terminal	PLATFORMS	Bloomberg API & BQL	TECHNICAL
Equity Workflow Consulting	DOMAIN	Process Improvement	TECHNICAL
Public Speaking	SOFT	Event Planning & Budgeting	SOFT
API Compliance	TECHNICAL	Multi-Asset Knowledge	DOMAIN

ACHIEVEMENTS

Duke of Edinburgh's Award, Gold

The Duke of Edinburgh's Award

Completed the full Gold award programme covering volunteering (50+ hours with Ronald McDonald House, Soup Kitchen London, Children In Need, London Food Bank), physical (football), skills (driving theory and lessons), expedition (Lake District environmental impact), and residential (Lake District hotel conservation and outdoor activities).

95% Client Process Efficiency Gain

Bloomberg LP · 2024

Led a client workflow redesign that reduced daily processing time from 3–4 hours to ~10 minutes.

28th at British National Biathlon Championships

British National Championships

Placed 28th in the country for biathlons at the British National Championships.

Club Cricket & County Cricket

Played cricket at club and county level.

Football Awards

Multiple club awards including Player of the Year, Players' Player of the Year, and Parents' Player of the Year. Played from age 4 and for Poulton Youth Football Club.