

Chase Nortman

Irvine, CA | chase.nortman00@gmail.com

PROFESSIONAL EXPERIENCE

Audit Senior Associate

October 2024 - June 2026

Deloitte

Costa Mesa, CA

- Analyzed ASC 820 valuation inputs for Level II/III holdings, derivatives, and alternatives across \$1T+ AUM fund complexes.
- Led fair value and transaction testing across mutual funds, ETFs, hedge funds, fund-of-funds, and private credit vehicles.
- Rebuilt v2 of “Unicus,” a proprietary AI-powered IPO readiness tool, lifting its internal performance rating from 1.2/5 to 4.6/5.
- Engineered an LLM-to-LLM pipeline turning M&A interview transcripts into 30+ page reports on FP&A, tax, controls, and risk.
- Resolved accounting issues with C-suite leaders and fund administrators through working sessions, accelerating close timelines.
- Mentored junior staff and interns, reviewing workpapers and refining testing procedures to raise team efficiency.

Audit and M&A Advisory Intern

January 2024 - March 2024

HCVT

Irvine, CA

- Ran QoE diligence on 4 middle-market deals, analyzing EBITDA bridges, working capital, and customer concentration.
- Quantified pro forma and diligence adjustments and tied out cash proofs, supporting \$5.7M adjusted EBITDA vs. \$4.0M reported.
- Modeled income statements, balance sheets, and three-year monthly working capital from standardized trial balances.
- Automated QuickBooks trial balance preprocessing into QoE databooks via Excel VBA, saving 3+ hours per engagement.
- Reconciled cost flows across 427 containers and 65+ SKUs, validating inventory pricing and margins for an e-commerce client.

Audit and Assurance Intern

June 2023 - August 2023

Deloitte

Costa Mesa, CA

- Selected for the Controllershship Transformation team, supporting UiPath robotic process automation deployments for clients.
- Designed a three-dimensional scoring framework weighing build difficulty against ROI to rank client automation opportunities.
- Automated client-ready PowerPoint reporting with SharePoint, Copilot Studio, and VBA, saving 2+ hours per engagement.

Program Associate

October 2022 - June 2023

UCI Center of Investment and Wealth Management

Irvine, CA

- Designed an executive dashboard giving the Board oversight of LIFEvest program performance and outreach metrics.
- Automated applicant tracking for 300+ candidates in Python, streamlining data management and reporting.

PROJECT

TRACE | Supply Chain Research Platform

In Progress

Python, FastAPI, PostgreSQL/PostGIS, TypeScript, React, Three.js, Docker

<http://chasenortman.com/projects/>

- Build a research platform mapping public companies’ supply chains from reported revenue down to raw materials on a 3D globe.
- Tie every supplier link to SEC, government, or technical sources with verbatim-checked quotes and per-edge confidence.
- Model revenue exposure to commodity shocks and country disruptions for NVIDIA and Tesla, flagging steps with no backup site.
- Automate 10-K and Form SD supplier extraction with Claude Haiku 4.5 at \$0.03–0.12 per company.

EDUCATION

University of California, Irvine | Bachelor of Business Administration

June 2024

- Member, Beta Alpha Psi, Accounting Association, Undergraduate Business Association

SKILLS

Programming & Data: Python, SQL, PostgreSQL/PostGIS, FastAPI, SQLAlchemy, TypeScript, JavaScript, React, Three.js, HTML, CSS, Docker, XPath, RSS Feeds, LLM Prompt Engineering

Analytics & Tools: Advanced Excel (VBA), Financial Modeling, Dashboard Design, SharePoint, Copilot Studio, UiPath (RPA), QuickBooks, PowerPoint, Word

Investment & Financial Analysis: SEC Filing Analysis (10-K, 20-F, Form SD), Supply Chain Research, Fair Value (ASC 820), Level II/III Valuation, Derivatives, Alternative Investments, Mutual Funds, ETFs, Hedge Funds, Private Credit, Quality of Earnings, EBITDA Normalization, Net Working Capital Analysis, Financial Statement Analysis