

SUMMARY:

A seasoned Senior Consultant with over 15 years of experience in finance and accounting, including audit and financial reporting. Expertise in financial modeling, process improvement, and accurate forecasting, with a proficiency in Planful and PowerBI. Possesses the ability to discern clients' needs and deliver superior software and process solutions.

HIGHLIGHTS:

- Proficient in financial modeling and analysis, with a strong emphasis on multi-dimensional models to drive clients' financial planning and analysis (FP&A) and reporting processes.
- Experienced in process improvement, re-designing and implementing new budget processes, and creating executive dashboards that provide a comprehensive view of financial performance to facilitate decision-making.
- Proficient in forecasting and expense management, with experience in providing operating expense and planning redesign solutions using Planful platform.
- Skilled in the use of PowerBI to develop and present financial insights in a visually compelling manner.

PROFESSIONAL EXPERIENCE:

CFO Solutions

Amherst PA

Senior Consultant – August 2018 – Current

- Facilitated the integration of Planful platform for clients, managing multiple projects from scoping, design, build, and end-user training.
- Developed multi-dimensional models to drive clients' FP&A and reporting processes, trained internal staff on new functionality.

Old Republic National Title Insurance Company

Minneapolis, Minnesota

AVP/External Reporting Manager - December 2016 – August 2018

- Led the modernization of the financial reporting process through the implementation of Host Analytics project.
- Supervised one direct report and two indirect reports, redesigned the budget process to encompass the whole enterprise, and developed a new daily revenue model to drive more accurate forecasts.
- Educated staff from different departments on new processes and created training materials to help staff learn new systems.
- Reviewed all external GAAP and Statutory reporting, acted as the key financial liaison with both external auditors and internal auditors.

- Presented "Modeling at the speed of thought" at Perform 2018.

Berkley Human Services - Minneapolis, Minnesota

Senior Accountant / Analyst - April 2015 – December 2016

- Improved month-end procedures from a 5-day close process down to a 3-day close process
- Compiled and analyzed financial statements.
- Advised on business operations including revenue and expenditure trends, and facilitated month-end close processes, journal entries, and account reconciliation.

Travelers Inc. - St. Paul, Minnesota

Senior Accountant - September 2007 – April 2015

- Automated and advised on business operations including revenue and expenditure trends, automated and improved the manual reporting process transforming the manual two-week process into a three-day process, developed a financial modeling tool to identify and research variances on financial statements to increase accuracy as requested by the Controller, and built out an Essbase competitor model, which was able to benchmark competitors on a state-by-state basis.

HealthPartners Inc. - Bloomington, Minnesota

Accountant II - August 2005 – September 2007

Accountant I - June 2004 – August 2005

- Developed a reputation for developing high-quality analytics resulting in rapid promotion from Asset Management to Financial Reporting.
- Implemented new investment accounting software, reducing time spent manually preparing the investment pages.

EDUCATION

Master of Business Administration (MBA) – Concentration in Finance – 2010

Hamline University - St. Paul, Minnesota

Bachelor of Science - Accounting – 2003

Iowa State University - Ames, Iowa