

## FINANCIAL CONSULTANT

### Summary

A challenging opportunity that will allow me to contribute and develop as a successful business partner, leveraging my leadership, analytical, and relationship building experiences.

### Experience

01/2010 to Current

Financial Consultant Company Name 1/4 City , State

- Key point of contact and FP&A responsibility for seven diverse and rapidly growing lines of business within Corporate Banking.
- Full balance sheet and P&L forecasting responsibilities on both balanced balance sheet and MMCOF levels.
- Business-level and roll-up analysis around customer-level and industry drivers, roll-on/roll-off analysis, an extensive cross-sell portfolio, and loan/deposit pricing.
- Plan/Budget coordination, presentations, and proposals to LOB and finance leadership.
- Ongoing negotiation around performance improvement/efficiencies, and expected growth.
- Automation of daily balance sheet reporting, Plan templates, dynamic balance sheet/ P&L/reconciliation tools (VBA, Macros, SQL).
- Contribution to bi-annual stress testing efforts/coordination.
- Training of co-workers/business partners on balanced balance sheet and MMCOF methodologies.
- Point of contact for key aspects of the Canadian Initiative, helping to coordinate between domestic business groups and international partners.

01/2008 to 01/2010

Financial Consultant Company Name 1/4 City , State

- Responsible for full balance sheet & income statement analysis/forecasting/management reporting for Private Banking line of business consisting of a \$43 billion deposit and \$34 billion loan portfolio.
- Key national business contact for regional and central management reporting, business drivers, pricing, ALCO, credit/risk, analytics, and model development.
- Ongoing Wachovia merger/integration efforts.
- Development of new reporting & analysis tools within transitioning systems and amongst new finance partners.
- Design and implementation of complex financial forecast models and tools for leadership and finance partners nationwide, (Hyperion Essbase, Excel, VBA, & MS Access) Communication and presentations to various finance, accounting, and credit partners, with very positive feedback from leadership and peers.
- Automation and streamlining of time sensitive and resource demanding processes including daily/monthly reporting, production, and forecasting efforts.

01/2006 to 01/2008

Financial Consultant Company Name 1/4 City , State

- Supervised nine staff with constantly changing project goals and deadlines.
- Responsible for quarterly financial statement and variance analysis for \$13 billion commercial real estate portfolio.
- Designed and developed database solutions for a rapidly growing portfolio (queries, pivot table reports, Access forms, user interfaces, and workflow management).
- Automated several processes resulting in greater group efficiency and accuracy.
- Primary contact for quality assurance, training, database analysis, and workflow guidance.
- Modeling and high level trend reporting for budgeting, vendor management, and capacity planning purposes.
- Project lead involving analysis, training, and communication with both domestic vendors, and team members from Wells Fargo India Solutions.

01/2004 to 01/2006

Financial Planning Analyst Company Name 1/4 City , State

- Supported Certified Financial Planner & clients to establish individualized financial plans for retirement, investment, insurance, long-term care, and small business needs.
- Research, modeling & scenario analysis for clients financial planning presentations.
- Headed marketing, branding, and website design projects for privately-owned financial planning practice.

01/2000 to 01/2001

Intern Company Name 1/4 City , State

- Researched potential lease sites and comparables for corporate clients.
- Assisted in broker presentations and maintained client relations.

### Education

2012

Masters : Business Administration St. Mary's College of California Business Administration

2004

B.S : Management Science University of California 1/4 City Management Science

2004

B.S : General Biology University of California i¼ City General Biology

#### Skills

accounting, Automation, balance sheet, Banking, branding, budgeting, Budget, bi, capacity planning, credit, credit/risk, clients, client relations, database analysis, database, drivers, Essbase, finance, Financial, financial planning, FP&A, forecasting, forms, Hyperion, insurance, leadership, long-term care, Macros, management reporting, marketing, Access, MS Access, Excel, Modeling, negotiation, pivot table, presentations, pricing, processes, Project lead, proposals, quality assurance, real estate, reporting, Research, SQL, trend, variance analysis, vendor management, VBA, website design, workflow