

Hello *Data Analytics* group or *Finance/Accounting* dept.,

I would appreciate your consideration for a *Data Analyst* or *Staff Accountant* position at your company.

**I help my employer utilize its data and manage its money, in the most efficient manner possible:**

- I love the profession I have chosen; and I would like to help your analytics team to address its data analysis and financial recordkeeping challenges.
- To expand my capabilities, I have completed additional courses since attaining my BS degree in Finance.
- In various capacities, I have used at least a dozen ERP systems and G/L accounting programs.

**Beyond financial accounting, I have a passion for managerial (cost) accounting and data analysis. In other words, I am looking to analyze vital business data rather than process recurring accounting transactions.**

- To facilitate this “pivot,” I am enrolled in online training courses. Please click over to [Microsoft Professional Program in Data Science](#) and [Microsoft Excel for the Data Analyst](#) for a partial description of the coursework.
- During college, I learned two programming languages, while today I create *Excel* macros using *VBA* scripts. I have rudimentary knowledge of *MS Access* and was exposed to two other database programs. Early on, I learned that *SQL* was a powerful tool for data management. I was fascinated right then, but only recently did I have the opportunity to learn more.
- Expanding my skills into data analytics seems like a logical career progression. I am enjoying the subject matter and am excited about what I might soon do with these new skills.

**I may be qualified to help your team in several capacities, such as:**

- Inventory management and cost accounting
- Financial forecasting and trend analysis
- Commissions analysis and processing payroll
- Cash balance optimization and bank account recons
- Website analytics and social media utilization statistics
- Some projects or special tasks that I’m unaware of

I have been a liaison in three positions, interfacing between Accounting-Finance and the Legal, IT, or Marketing team. While I am primarily looking to “analyze data,” I could help your finance-accounting-bookkeeping team as well, given how that is a big part of my past experience.

**Additional information can be downloaded from my [Dropbox](#) and [GitHub](#) accounts; including:**

- Excel and PowerPoint work samples
- A résumé that is ATS-compliant (chronological, simple formatting, typical section headings)
- Course certificates and commendation letters

Thank you for your time and interest.

Sincerely,

Allan M. French

Mountain View, CA 94040



Leave voice/text messages (at any time) at (408) 634-6466 • Mountain View, CA 94040

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**Allan M. French**  
Mountain View, CA 94040

## DATA ANALYST • STAFF ACCOUNTANT

▣ Numbers Crunched • Beans Counted • Data Wrangled ▣

With a passion for analyzing data and developing software solutions, I am pivoting from *financial accounting and corporate finance* into *data analytics and managerial (cost) accounting*.

### SOFTWARE KNOWLEDGE

#### *Data Analysis, Cash Management, Payroll*

<b>Excel</b> ( <i>incl. pivot tables, VBA macros, lookups; 10+ yrs</i> ) <b>Allocadia</b> cloud-based budgeting software <b>Dun &amp; Bradstreet “CreditWatch”</b> ( <i>hardcopy format</i> ) <b>Bloomberg terminals</b> ( <i>for financial research; 5 years</i> ) Preliminary exposure to <b>SQL, Python, Azure, and Jupyter</b> ( <i>details in Education block</i> )	<b>ADP Pay eXpert</b> (“Payex”) <b>NovaTime</b> online timecard system <b>Paychex</b> ( <i>2 years</i> ) <b>MS Access</b> and 2 legacy <b>database programs</b> ( <i>limited</i> )
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#### *Corporate ERP / Small Business Accounting*

<b>Sage MIP Fund Accounting</b> ( <i>2½ years</i> ) <b>Sage MAS-90</b> ( <i>a.k.a. “Sage 100 ERP,” for 6 years</i> ) <b>Microsoft Dynamics GP</b> ( <i>recent training</i> ) Plus <b>six others</b> ( <i>legacy applications and proprietary software</i> )	<b>Oracle Financials</b> ( <i>Procurement module</i> ) <b>SAP</b> ( <i>Accounts Payable module</i> ) <b>QuickBooks</b> ( <i>both Pro and Enterprise editions</i> )
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#### *Additional Tools*

<b>GitHub, Dropbox, SharePoint, FTP, Box, and Slack</b> <b>Adobe Acrobat</b> ( <i>customized templates and forms</i> ) <b>PowerPoint, Word, Publisher, Windows, and Outlook</b>	<b>Two legacy computer programming languages</b> <b>Basic HTML website coding skills</b> <b>Lacerte and CCH TaxWise</b> professional tax software
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### ACHIEVEMENTS & DUTIES

#### *Data Analysis and Visualization Projects*

- Transitioned a marketing team from an Excel-based budgeting tool, to a *cloud-based “MRM” solution*.
- *Extracted customer records* from QuickBooks Pro, *cleaned-up the dataset*, and prepared it for catalog mailing campaign; client later reported that non-deliverable mailings were down substantially.
- Designed an Excel-based *CRM tool for contact management*.
- Developed and presented a *PowerPoint slideshow* on personal income tax preparation, for job seekers at a networking event; and created a slideshow to screen for coworkers, as part of an office celebration.
- Created a *macro-driven “client services database”* in Excel, for a local nonprofit organization.

#### *Leadership and Communications:*

- Served as a *liaison between Accounting and other departments*, twice officially and once unofficially; *trained or mentored* colleagues on at least four occasions.
- Invited to serve (pro-bono) on the *board of directors* of two nonprofit organizations, and served one of them.
- *Discovered and reported a software error* in the Profile Summary section of the LinkedIn website. It caused incorrect information to be saved into some members’ profiles. (Has been corrected; request YouTube video URL, to see error for yourself!)
- Charter member of “Money Talks” chapter of Toastmasters *public speaking club*, 1995-1996.
- Written *over 105 monthly newspaper columns*, published by the largest nonprofit organization of its kind (with circulation of around 3,000); expository writing samples available upon request.

#### *Fixed Assets, Inventory, and Expenses:*

- Within consolidated invoices, allocated expenses among *21 business units*.
- Capitalized fixed assets; integrated add-on *fixed asset management* module into QuickBooks Enterprise system, and taught colleagues how to use it.
- Audited and reconciled *raw materials inventory* (billed-vs-actual), for a medical devices manufacturer.
- Categorized historical fixed asset data, for *depreciation expense* calculations.

### Cash, Investments, and Payroll:

- Calculated *mutual fund share prices*, created *pro-forma financials*, and provided fund *performance statistics* to ratings agencies and the SEC, during 6 years with an investment management company.
- Prepared *bank recs for 20 real estate properties*, involving 85 cash accounts among 3 banks, for 2½ years.
- Onboarded the *new hires* and managed the *payroll of 70 employees* in two states, for a business services firm; also developed an *HRIS recordkeeping system* for them.
- Created solution to ascertain *cash burn rates* and forecast *cash reserves*, to minimize under-invested funds.

### Financial Statements and Taxes:

- Analyzed *financial statements* and gauged potential *credit risk* of large general contractors.
- Filed *sales/use tax returns* and prepared *571-L business property statements*, for clients of small CPA firm.
- Prepared *personal income tax returns* for elderly and low-income individuals, as a pro-bono service.

## EDUCATION & RECOGNITION

### Education and Certification:

- Additional courses taken since attaining BS degree, including 5 in the latest 1½ years (both academic and software). Also, several Master degree courses at University of Phoenix and Golden Gate University.
  - ▶ Recent and ongoing training on data analytics and managerial (cost) accounting, via EdX and Coursera online learning platforms. Relevant software tools include *Python*, *SQL*, *Azure Machine Learning Studio*, and *Jupyter Notebook*, as well as *Microsoft Power BI* and advanced *Excel* topics. (Cover letter has weblinks to further details.)
  - ▶ Was exposed to two legacy database programs in the past, plus *Microsoft Access* more recently. Self-trained on *MS Dynamics GP* several years ago, using college-supplied course materials; exposure to current version is ongoing, via LinkedIn Learning.
- California CTEC “*Registered Tax Preparer*,” 2011-2013; certified “*Microsoft Office Excel Specialist*”;
- Red Cross “*CPR and AED Certified*,” 1/2016-1/2018.
- Bachelor degree in *Finance / Business Administration*, California State University, Chico.

### Employer Satisfaction:

- Presented with a Special Achievement Award “*in recognition of the manner in which you have completed your assigned tasks.*”
- Thank-you note e-mailed by former supervisor: “*The time you saved me tonight is greatly appreciated.*”
- Served clients in 17 contract positions for 5 staffing agencies; 5 seasonal clients/employers requested to re-engage; received letters of reference from 3 employers; and 3 temp jobs were extended or renewed.
- While one particular role was not mission-critical, it made life easier for 17 other people. “*Knowing that someone [else] is doing the PRs takes a weight off my shoulders.*”
- A finance manager’s reference letter states that “*the true character of a person is shown when they are given a job that no-one wants to do, and they do it well.*”

## EMPLOYMENT

### Key Employers

<b>American Century Investments</b> (6¼ years)	<b>Applied Materials</b> (contracting, 1 year)
<b>Hewlett-Packard Company</b> (contracting, 1 tax season)	<b>Commercial Surety Bond Agency</b> (internship)
<b>VMware</b> (2 quarterly contracts)	<b>US Geological Survey</b> (3¼ years)
<b>Guidant Cardio-Vascular and Tyco Healthcare</b>	<b>C.J. Olson Cherries</b> (consulting, 3 year span)
<b>SLAC National Accelerator Laboratory</b> (2½ year span)	<b>Housing For Independent People</b> (2½ years)

### Dates and Details Upon Request

### Notable Job Titles

<b>Mutual Fund Portfolio Accountant</b> and <b>MIS Liaison</b>	<b>Fixed Assets - Payroll - HRIS Accountant</b>
<b>Staff Accountant</b> or <b>Bookkeeper</b> (on multiple occasions)	<b>Personal Income Tax Preparer</b> (pro-bono)
<b>A/P Internal Auditor</b> and <b>Payables Accountant</b>	<b>Marketing Dept. Budgeting Specialist</b> and <b>A/P Liaison</b>
<b>Legal Dept. Finance Coordinator</b> and <b>A/P Liaison</b>	<b>Excel Solutions Architect</b> (on multiple occasions)

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