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SENIOR FINANCE DIRECTOR

Delivering Multimillion-Dollar Returns in Profitability Increases & Cost Reductions

Work in collaboration with the executive team to identify and leverage opportunities for cost savings and revenue increases. Drive change—including systems standardization and reporting automation—to propel organizations forward in a competitive environment. Strong contributions in the areas of finance line support and financial planning & analysis (FP&A).

STRENGTHS & QUALIFICATIONS

- Strategic Planning & Forecasting
- Compensation Modeling
- Presentation Data Visualization
- Budget Creation & Management
- Continuous Process Improvement
- Cross-functional Collaboration
- Line Support – Sales and G&A
- Productivity Improvement
- Financial Planning & Analysis
- Complex Problem Solving

PROFESSIONAL EXPERIENCE

Xxxxxxxx Investments – City, ST

2008 to Present

SENIOR DIRECTOR OF FINANCE, Xxxxx Institutional Asset Management (XIAM), 2016 to Present

Manage forecasts, multiyear planning, ad hoc analysis, and budget support for business unit with approximately \$1.3 billion in revenue and around 650 employees. Oversee monthly close processes and reporting to senior management, including scorecard update on financial health of the business. Evaluate financial implications for various products and repricing activities. Manage and mentor up to three associates.

SELECTED ACCOMPLISHMENTS:

- Improved operating income \$20 million by negotiating with stakeholders in two business units to bring outdated revenue-sharing agreement into alignment with current market conditions.
- Played pivotal role in strengthening management's decision-making capability by revamping strategy and financial implications of division's voluntary buyout options (VBOs) in 2017.
- Trimmed monthly reporting volume 50% (from 40 pages to 20) and cut process completion time three days by streamlining management reporting.
- Contributed expertise on Finance Modernization committee; reviewed impact of proposed new planning tool on current organization, as well as implementation options for 2020 planning.
- Mentored and developed three summer interns to attain positions as full-time staff members.

SENIOR DIRECTOR OF FINANCE, Enterprise Functions, 2012 to 2016

Collaborated with consulting, human resources, security, and corporate risk functional leaders to help drive business results by developing strategic multiyear plans, quarterly business reviews, and ad hoc financial analysis. Served as informal mentor to Westlake Center of Excellence team supporting Enterprise Functions.

SELECTED ACCOMPLISHMENTS:

- Achieved 13% reduction in costs across 5 business-unit G&A groups, including corporate security. Led scale-and-efficiency efforts to achieve targeted savings; assisted struggling groups by suggesting cost-avoidance actions that reduced need for additional staff.