

Caitlin Zimmerman

Experienced Financial Analyst looking to use analytical and quantitative skills to create financial models that reduce cost and improve financials at a large bank.

Orlando, FL

(444) 431-8740

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SKILLS

MS Excel

MultiView

PowerPoint

EDUCATION

University of Florida

Gainesville, FL

2006 – 2019

B.S. in Accounting

GPA: 3.8/4.0

CERTIFICATIONS

Chartered Financial Analyst
(CFA) Level 1

2014

Certified Public Accountant
(CPA)

2013

WORK EXPERIENCE

Senior Financial Analyst, HP Morgan

Jacksonville, FL • January 2019 – Present

- Assist in annual financial planning process with quarterly forecasts, periodic updates and detailed team level plans
- Develop reporting on a departmental level to give Operations and department heads deep insight into the financial performance of their functional area of the business
- Assist in implementing provider performance reporting that gives the company's medical providers better insight into their monthly financial performance
- Work with Business Intelligence platform to ensure that all reporting is integrated into the system and available conveniently to those that need it
- Develop projection models for potential acquisitions and analyze project value based on EBITDA, NPV, and Discounted Cash Flow.

Senior Financial Analyst, Remedy Bank

Jacksonville, FL • January 2015 – December 2018

- Analyzed revenue and key performance indicators to identify emerging trends
- Daily maintenance of consolidated and divisional rolling forecast models
- Provided ad-hoc financial analysis and financial modeling to support business objectives
- Met with key stakeholders for review, preparation, and consolidation of annual budget
- Assisted with monthly management and quarterly Board of Director presentations
- Partnered with accounting to ensure consistency between forecast and actuals
- Reviewed actual results and variances to plan with departmental managers
- Played key role in the development, implementation and oversight of compensation and bonus incentive plans
- Calculated quarterly incentive comp calculations for sales and account management

Business Analyst, Dinge Bank

Jacksonville, FL • September 2010 – November 2014

- Supported Head of Finance in building operating and financial forecasts
- Provided decision support to management by building models for marketing spend effectiveness, product R&D, monetization strategies, third-party vendor contracts, and other ad hoc analyses
- Assisted the accounting team in managing business expense processes (invoice processing, fixed asset tracking, credit card management)
- Partnered with internal departments in managing monthly and quarterly close processes
- Lead ongoing reporting of key metrics to management