

# Scott Goldstein

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## Business-Systems Data Analyst

Analysis, Reporting, Data Management

Excel, Access, VBA, SQL

## Career History

<b>Private Consultant</b>	<b>Self-Employed</b>	<b>Los Angeles</b>	<b>3/2016 to Present</b>
Took time off from corporate analysis to work part-time as a home-computing consultant and to focus on family. Providing top-notch customer service with wireless networking, virus removal, hardware troubleshooting & repair, internet safety, software set-up and more with a focus on seniors. Also, have built a couple Excel / Access / VBA projects around publicly available datasets on my own, to stay sharp and current, and to continue honing my VBA skills.			
<b>Sr. Business Analyst, Contractor</b>	<b>Bank of America</b>	<b>Westlake Village</b>	<b>4/2015 to 3/2016</b>
Addressed corporate requests for data-mappings to and from mortgage lending production servers. Researched requests in SQL and C# code. Wrote logic for new requests and specified code changes for updates. Built mapping management tools in Access/VBA. Developed productivity analysis SQL scripts for management. Built release-notes collection and reporting tools in Excel, VBA and SQL.			
<b>Data Consultant III, Contractor</b>	<b>Bank of America</b>	<b>West Hills</b>	<b>6/2013 to 11/2014</b>
Developed a set of tools for analyzing and reporting on SQL Server user data ownership and usage in SQL and Excel. Measured data access and changes over time and made extensive use of SQL Server system tables. Resolved ongoing intranet data-transfer anomalies.			
<b>Revenue Sharing Accounting Analyst</b>	<b>TrueCar.com</b>	<b>Santa Monica</b>	<b>9/2011 to 10/2012</b>
Created revenue-sharing reconciliation system in SQL, Excel and VBA using highly disparate datasets. Verified all commission payments to partners. Identified past errors as well as root causes for past inexplicable accounting anomalies. Reduced reconciliation time from a week to a few hours. Simplified partner reports. Used Microsoft Dynamics in root-cause research.			
<b>VP Financial Analysis and Reporting</b>	<b>Bank of America</b>	<b>Calabasas</b>	<b>8/2006 to 5/2011</b>
Designed business processes and built technology to support the trading desk. Built system to identify, categorize and reconcile fees to the penny. Reconciled millions of rows of external invoice data, worth about \$1B, annually, against internal systems. Saved the company around \$30M over 5 years. Managed team of analysts. Developed high-precision, automated compliance and fee reconciliations based on contracts and guidelines. Negotiated settlements with Fannie Mae and Freddie Mac. Built a denormalized SQL warehouse and used it for metrics and ad-hoc analyses. Developed a new set of GL accounts with corporate accounting and provided monthly GL entries and backup. Developed a variety of invoice error reports for stakeholders in SQL and Excel, and productivity reporting for management. Projected financial risk on unresolved invoicing problems from GSE's. Developed intelligent data-entry workbooks to collect immaculate data from my research partners. Approved around \$120M in wire transfers monthly. Built all my team's analysis technology in SQL, SSIS, Excel, Access and VBA.			
<b>Senior Business Systems Analyst</b>	<b>Bank of America</b>	<b>Calabasas</b>	<b>9/2002 to 10/2005</b>
Analyzed and improved trading desk technology. Collected requirements from the trading desk, wrote specs, tested code and trained users. Analyzed financial impact of prospective changes to loan pooling technology using SQL and Excel. Analyzed and reported on huge datasets using Excel. Spearheaded data-quality initiatives. Researched root causes for data anomalies in secondary marketing all the way back to loan origination. Used Excel and SQL extensively.			
<b>Systems Analyst II</b>	<b>University of Southern California</b>	<b>Los Angeles</b>	<b>7/2001 to 6/2002</b>
<b>Business Systems Analyst, Contractor</b>	<b>Pfizer Health Systems</b>	<b>Santa Monica</b>	<b>2/2000 to 5/2001</b>

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## Additional Skills

### Excel

Tables, Structured References, Named Ranges, Named Formulas, Excel Data Model  
VBA and Macros, User Functions, UserForms, Class Modules, Excel Object Model  
Pivot Tables, Pivot Charts, Charts and Graphs, Sparklines  
External Data, Data Connections, MS Query, CSV Files  
VLOOKUP, INDEX-MATCH, Array Functions, Indirect  
Validation, Dynamic Multi-Nested Validation  
Financial Reporting, Financial Statements  
Complex Formulas, Formula Debugging  
Sheet Troubleshooting and Repair  
Complex Conditional Formatting  
Security and "Idiot-Proofing"

### Data / Database

Relational Database Design, Data Modelling, Data Diagrams  
Reports, Forms, Intelligent Data Entry  
Data Scrubbing, Data Management  
Data Deep Diving  
MS Access

### SQL / SQL Server

Complex Joins, Views, Stored Procedures, Functions, and Triggers, Common Table Expressions  
SQL Server Administration (DBA), Indexes Creation and Maintenance  
ETL, SSIS, OpenRowSet, Linked Servers, ADO Data Source  
DDL, DML, DCL, DQL

### Mortgage Banking

Secondary Markets, Risk-Based Pricing, GFees, Loan Pooling  
Conventional Eligibility and Pricing Guidelines  
FNMA, FHLMC, GSE

### General

"Most accurate reconciliation in the country" - FNMA Billing  
Highly Detail-Oriented, Precision-Focused, Thorough  
Experienced Presenter and Trainer  
Excellent Subject Matter Expert  
Technical Leadership Skills

## Education

### College

Berklee College of Music – Boston, MA – Bachelor of Arts

### Continuing Education

UCLA Extension – Relational Database Development, Systems Analysis, C, C++, C#, CSS  
CA Community College – Business, Accounting, Economics