
GREG BOLAN

FINANCIAL ANALYST

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♦ <https://github.com/gshark123>

PROFESSIONAL SUMMARY

Highly motivated and goal-driven Senior Financial Analyst with 13 years' experience and skilled in collecting, monitoring and studying data to analyze financial status and recommend investment strategy. As an aspiring Data Analyst, practicing use of Tableau, Excel spreadsheets, and other software to help provide insights and support optimal business decision making. Astute business owner with three years of experience in operations management, competitive analysis and financial management. Honorably served in the United States Army.

DATA ANALYTICS EXPERIENCE

Nashville Software School (NSS), 09/2020 to 01/2021

Data Analyst – Nashville, TN

- Four month full-time intensive introduction to data analytics and business intelligence processes and tools.
- Emphasis on analytical reasoning through hands-on training on every stage of analytics workflow.
- Using real data presented by Nashville employers, when possible, learning included communication of findings through presentations, storytelling, building reports and creating dashboards.

Tools learned: *Excel, SQL, Power BI, Python, Tableau, GitHub, Zoom, Slack*

Data Projects

Drug Wholesalers (Tableau & Excel)

- Examined growing parity between Drug Wholesaler sales growth and Pharma Spend growth
- Used Tableau, CSV and excel files from the Congressional Budget Office and Centers for Medicare and Medicaid
- <https://public.tableau.com/profile/greg.bolan#!/?newProfile=&activeTab=0>

Capstone Project: Drug Distribution Channel (Tableau & Excel)

- Explored tailwinds for pharmaceutical spending, including age demographics and chronic conditions
- Explored headwinds for consumers as drug costs continue to rise
- <https://public.tableau.com/profile/greg.bolan#!/?newProfile=&activeTab=0>

PROFESSIONAL EXPERIENCE

CEO of Federal Express Franchise (FedEx), 10/2018 to 04/2020

Business Owner – Franklin, TN

- Directed business operations for 25-employee franchise generating \$750k in annual revenue.
- Analyzed performance data to evaluate and improve operations, targeted current business conditions and forecast needs resulting in increased revenue from \$750k to \$910k in 15-month period.

- Maximized business operational efficiency and achieving 15% net profit margin.
- Implemented employee engagement opportunities through employee recognition, daily power meetings, new and improved fleet amenities resulting in reduced turnover from 25% to 5%.

Founder and Senior Portfolio Manager, 03/2017 to 09/2018

Star B Capital Fund, LP – Nashville, TN

- Conducted target market research to determine hedge fund concentration in healthcare and episodic trading strategy with daily trading \geq \$10MM.
- Hedge fund spawned from proprietary trading and performance formally examined by EisnerAmper Auditors.
- Established, optimized and enforced hedge fund consistency and high-quality standards through fund registration in Delaware, utilizing Jones Trading as prime broker, engaged legal entity Sadis & Goldberg to ensure quality and regulatory compliance.

Senior Financial Analyst-Healthcare Equity Research, 08/2015 to 03/2017

Avondale Partners – Nashville, TN

- Ranked top quartile of 10 senior analysts voted by clients and sales force; i.e. Fidelity, Pyramis, Wellington, Waddell.
- Developed presentations and statistical analysis forecasting reports to inform and educate stakeholders and financial teams on pharmaceutical companies' profit and loss possibilities.
- Delivered statistical information to determine financial trends for use in investment accounting and financial analysis on 15 companies, including extensive valuation analysis
- Managed and mentored Associate Analyst resulting in promotion to Senior Associate Analyst.

Managing Director, Senior Financial Analyst - Healthcare Equity Research, 10/2011 to 10/2014

Sterne Agee – Nashville, TN

- Monitored SEC filings for industry trends to coincide with analysis of business for strong, weak forecasting.
- Performed accounting and financial analysis on 14 companies, including extensive valuation analysis.
- Ranked top quartile of 35 senior analysts for both sales force and client votes; i.e. Fidelity, Pyramis, Wellington.
- Awarded number one Stock Picker for Life Science Tools & Services by STARMINE.
- Championed build-out of highly experienced team of healthcare analysts, including Specialty Pharma, Managed Care, and Medical Devices and Diagnostics sub-sectors.
- Managed and mentored Associate Analyst resulting in promotion to Senior Equity Analyst

EDUCATION

Data Analytics Bootcamp, Jan 2021

Nashville Software School – Nashville, TN

BBA: Finance, May 2002

Emory University - Goizueta Business School - Atlanta, GA