

# RYAN SCHWARK, MBA

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## PROFILE

Financial analyst seeking a job in strategic FP&A. Passionate about financial modeling, data analytics, and strategy. Excellent organization, problem solving, communication, and leadership skills. Former background in chemical engineering.

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## EDUCATION

### University of Wisconsin-Madison - Madison, Wisconsin

08/19 - 05/21

*Master of Business Administration*

GPA: 3.8

Specialization: Corporate Finance and Investment Banking

- Case Competition: IGNITE case competition winner
- Certificate: Graduate Business Data Analytics for Decision Making
- Recipient: Nicholas Center Corporate Finance and Investment Banking Scholarship

### Colorado State University - Fort Collins, Colorado

08/11 - 05/15

*Bachelor of Science*

- Major: Chemical and Biological Engineering

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## PROFESSIONAL EXPERIENCE

### Sherpa LLC - Charlotte, North Carolina

11/22-Present

*Financial Analyst Contractor*

- Supported reporting and analysis for Bank of America's Post Trade Tech and Regulatory Reporting & Ops Tech LOBs
- Compiled month end actuals and provided variance analysis and commentary for the LOBs
- Accrued for various technology expenses using Bank of America's CAFA application
- Developed automated PowerBI reports to identify accruals that needed reconciliation, reconciled month end actuals versus forecast, and easily lookup invoices from multiple datasources
- Performed hierarchy maintenance to support reorganizations using the bank's HMA (Hierarchy Maintenance Application)
- Prepared journal entries as needed to properly account for the LOB's expenses

### Thermo Fisher - Fort Collins, Colorado

07/21-07/22

*Financial Analyst III*

- Lead FP&A for Thermo Fisher's recently acquired Cell Sorting Technologies (Bigfoot) business segment
- Created automated reports from the COGNOS data warehouse to maintain a full P&L from revenue to EBITA for the business
- Prepared key reports and presentations for the STRAP (strategic operating plan), AOP (annual operating plan), monthly/quarterly forecasts and closes, and weekly leadership updates
- Collaborated with business leaders to establish yearly operating budgets and forecasts for SG&A, R&D, and Sales and Marketing
- Created automated 'waterfall' charts to track the key drivers between actuals versus plan and prior forecasts
- Calculated and assisted in developing standard costing reporting processes for the various Bigfoot Cell Sorters configurations
- Assisted in developing accounting reports for the E&O and warranty reserves
- Established controllership procedures to properly account for capital expenditures and trained key end users on purchasing workflows
- Set up KPI tracking to help business leaders make informed investment decisions that aligned with the team's strategy

### AmeriLux International - DePere, Wisconsin

06/20 - 09/20

*Senior Financial Analyst Intern*

- Independent consultant asked to determine a fair acquisition price for Shape Products
- Created a flexible DCF model that was adopted and used by AmeriLux in their presentations to their bankers
- Modeled key ratios such as transaction ROIC, pro forma leverage, and free cash flow with sensitivity analysis around key drivers
- Analyzed unconventional financing agreements for the acquisition such as a royalty stream that was used in the deal
- Performed a market capitalization analysis of the window well and window well cover market in the United States using both top-down and bottom-up analysis
- Presented final analysis and buy recommendation to Amerilux management and CEO

*Shape Products Data Analyst Intern*

01/21 - 03/21

- Utilized Tableau to create compelling visualizations for Shape Product's sales in Home Depot's test markets
- Developed a script in R to scrape Amazon product reviews and identify key product qualities
- Leveraged a web scraper to build a list of potential customers which included every single lumber yard, waterproofing contractor, and concrete contractor listed in the Yellow Pages in the United States

*Technical Services Engineer*

- Managed technical support for Epic's pharmacy, security, and inventory applications for major health care systems
- Project manager for major version upgrades and new functionalities
- Developed numerous searches and reports in MUMPS to identify records potentially affected by bugs or bad build; one search identified records impacted by a workflow that was costing hospitals hundreds of thousands of dollars
- Solved complex problems and provided customized solutions for my customers' unique workflows
- Mentored new hires to develop a problem-solving mindset

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**ADDITIONAL INFORMATION**

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- CFA level II candidate. Passed level I exam on 8/29/2022
- Completed all exercises in "*Learn Python the Hard Way*"
- Working knowledge of Python, Tableau, Excel (macros, XLOOKUP, pivots, VBA, etc.), PowerPoint, and the rest of the Microsoft Office Suite. Basic knowledge in R, Cache/M, HTML, VB, SQL, Java, and Crystal SAP
- Wall Street Prep – Excel, Accounting, and Corporate Finance completed
- Certified IFSAC Level One Fire Fighter. EMT-Basic, NREMT certification expired
- Various volunteering activities including being a Larimer County Food Bank volunteer for over two years