

FINANCIAL ANALYST

Data Mining & Manipulation • Strategic Planning • Financial Reporting

Client-focused, results-driven problem-solver with extensive experience in the education, insurance, and utilities industries. Demonstrated ability to successfully manage multiple priorities and responsibilities. Expertise in turning data into actionable insights. Collaborate effectively with management, clients, and across functional groups to develop state-of-the-art solutions that help influence senior leadership. Proven ability to identify new opportunities in existing customer problems that increase efficiency and improve profitability. Excellent quantitative, written, and presentation skills; innovative, organized, thorough.

Core Competencies

- R Scripting • SQL Programming • Integration • Visualizations • Productivity Improvements • Forecasting
- Financial Modeling • Financial Operations & Systems • Time Management • Decision Support

CAPVISOR ASSOCIATES, LLC, Remote

2018 – 2019

Solutions Consultant (2018 – Current)

Functioned as an R expert providing ReporteRs package support. Architected, deployed and maintained a sophisticated client reporting platform developed in R. Led on all matters regarding the reporting platform including new reporting capabilities/enhancements and execution. Built knowledge base of troubleshooting and development documentation. Principal architect for the new PowerBI reporting platform. Provided remote support and financial reporting expertise.

Creative ways to handle big picture challenges

- **Developed an 'R' solution** to circumvent input validation issues and improve the data entry process resulting in a 50% improvement in Quarterly processing completion time.

UNIVERSITY OF GEORGIA, Athens, GA

2010 – 2019

Research Analyst (2016 – 2019)

Highly technical position that works in the analytical and technical aspects of research related to student financial aid. Responsible for the design and direction of research and operational projects. Supervise collection and analysis of data. Provide interpretation of findings and organize conclusions into form(s) suitable for use by University administration. Identify and implement system modifications needed to process statutory, regulatory and policy changes. Analyze complex problems related to awarding, monitoring and disbursing student financial aid. Evaluate new financial technologies and systems for implementation.

Find creative ways to handle big picture challenges

- **Created a Shiny dashboard** to analyze state institution enrollment trends that adapted into a managerial DSS.

Develop forward-thinking analysis

- **Developed an 'R' NLP hiring solution** that utilizes ML to text mine applicant profiles and quantitatively evaluate the best matches for job postings thereby decreasing the number of candidates by 40%.

Data Management Specialist III (2010 – 2016)

Collected, maintained, analyzed and distributed data associated with UGA facilities. Managed data and analytic reports for adhoc studies and requests. Assisted in the preparation of special analyses and reports for The University administration and the various colleges, schools and departments.

Develop new tools in order to drive scalable analysis and insight

- **Redesigned Program Review Annual Reporting Process** resulting in a 50% reduction in processing time.
- **Developed an MS Access Oracle Interface** that produced a 25% improvement in data integrity.

OIL PRICE INFORMATION SERVICE, Wall, NJ

2005 – 2010

Technical Product Manager

Monitored and assessed current data collection methods to formulate process improvements and increase operational and cost effectiveness. Developed and implemented business strategies for five key OPIS products. Assisted in the development and implementation of policies and procedures designed to increase efficiencies. Developed and created new data offerings, including GIS mappings, web applications, site updates, and stand-alone tools for running and processing data. Assisted in creating systems designed to integrate the full range of OPIS products, meshing crude, spot, rack, and retail data that enhanced the overall value of the company's product offerings.

Architect Metrics

- **Achieved a 70% reduction in workflow processing time** by designing an MS Access VBA based system that streamlined the manual creation and dissemination of five daily Excel reports into one centralized platform.

PRUDENTIAL FINANCIAL, Holmdel, NJ

1998 – 2005

Team Lead-Systems Consulting

Directed and provided technical leadership on three successful high-profile, high-priority projects. Performed technical studies. Evaluated business area requirements to develop proposals for clients and management detailing technology solutions and alternatives. Formulated recommendations for acquisitions and enhancements designed to increase efficiency, productivity, and profitability.

Work in close partnership, collaborate and consult with colleagues

- **Project Lead on the company's Lotus Notes Release 3.0 Standards Taskforce**, directed team to establish company-wide best practices for using Lotus Notes applications.

GPU ENERGY, Allenhurst, NJ

1995 – 1998

Application Developer

Functioned as single point of contact for assigned client groups in support of application development activities. Supervised a variety of site-related projects and problem resolution efforts. Collaborated effectively with business units to articulate process improvements and identify opportunities for utilizing available and emerging technologies to enhance operations. Directed the implementation of new applications on the company's client server platforms. Oversaw hardware and software upgrades to ensure overall system compatibility, efficiency, and operational effectiveness.

EARLY CAREER EXPERIENCE

- **Senior Programmer Analyst, CONTINENTAL INSURANCE**, Neptune, NJ

VOLUNTEER EXPERIENCE

- **STADION GOLF CLASSIC**, Scoring Central, 2011 – 2012
- **NCAA WOMEN'S GOLF TOURNAMENT**, Administration, 2013

EDUCATION

- **MASTER OF INTERNET TECHNOLOGY (MIT), Concentration - Full Stack Development**, University of Georgia, Athens, GA
- **MASTER OF BUSINESS ADMINISTRATION (BBA), Concentration – MIS**, Monmouth University, W. Long Branch, NJ
- **BACHELOR OF BUSINESS ADMINISTRATION (BBA), Major - Finance**, University of Texas, Austin, TX