

Brent Lund

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Billing Specialist | Data Analyst | Excel Expert

Professional Summary

Results-driven Data Analyst and Excel expert with over 10 years of experience in financial operations, reporting, and process optimization. Proven track record of leveraging advanced Excel functions—including PivotTables, VLOOKUPS, and macros—to automate workflows, enhance reporting accuracy, and uncover actionable insights. Adept in data cleaning, ETL processes, and dashboard development using SQL and Tableau. Skilled at translating complex datasets into strategic business solutions and communicating findings to stakeholders. Excels in fast-paced, data-driven environments requiring precision, accountability, and cross-functional collaboration.

Work Experience

Atria Wealth Solutions

May 2018 – July 2025

Senior Managed Accounts Analyst | November 2023 - July 2025

- Promoted to a higher role, expanding responsibilities while retaining all previous duties to ensure continuity.
- Led SCF's Advisory department, overseeing all operations and resolving issues to ensure seamless departmental performance.
- Cleaned and formatted very large .csv files using vlookups, pivot tables, and other functions.
- Managed, processed, and reconciled advisory billing for two separate broker dealers (SCF and WIS).
- Created new processes, automations, and workflows increasing efficiency by 10% each month.
- Compiled, analyzed, and delivered data-driven insights by using data visualization to corporate leadership.
- Created ad-hoc reports for management and stakeholders.
- Maintained strong communication with financial advisors, providing clear, timely responses to inquiries and resolving complex account or billing issues.
- Audited quarterly invoices from the Orion billing system, identifying significant discrepancies and overbillings—resulting in cost savings of tens of thousands of dollars per quarter.

Financial and Operations Specialist | November 2019 – October 2023

- Executed time-sensitive monthly and quarterly billing cycles, meeting strict deadlines with 100% accuracy.
- Managed, processed, and reconciled advisory billing.
- Conducted thorough audits of billing files and databases to ensure accuracy and compliance with regulatory standards.
- Managed over \$4.5 billion in AUM for 40,000 client accounts.
- Developed and implemented Excel macros to automate daily tasks, improving efficiency and reducing manual workload.
- Generated KPI reports using Excel and QuickBooks to assist accounting.
- Prepared and delivered files to the Commissions team for seamless import and processing.
- Reviewed advisor-client contracts and imported data into the Orion/Black Diamond billing system, ensuring accuracy.
- Responded to and resolved billing inquiries from advisors, providing accurate and timely support.

Commission Specialist | May 2018 – October 2019

- Managed commissions, accounts payable/receivable, financial analysis, and operational support to ensure smooth financial operations.
- Processed and ensured accurate weekly commission payments to advisors, maintaining financial integrity.
- Generated and delivered detailed weekly commission reports to advisors, providing key financial insights.

Kuhtz Diehl Insurance

October 2017 - January 2018

Accounting Administrative Manager | *Contract*

- Extracted insurance carrier commission data, cleaned and formatted spreadsheets for import, and processed data in Gen4 for accurate reporting.
- Managed bi-weekly commission payments for over 500 agents, ensuring timely and accurate disbursements.
- Maintained meticulous attention to detail while overseeing payouts to ensure accuracy and compliance.
- Provided responsive phone support to clients and agents, addressing inquiries and resolving issues efficiently.

Mobile Defenders

July 2013 - June 2017

Operations Manager | *June 2015 – June 2017*

- Relocated from Michigan to California to establish and manage a new distribution center, overseeing all logistics and operations.
- Served as a senior management team member, reporting directly to the CEO and President.
- Led sales, customer service, and warehouse teams, ensuring seamless operations.
- Managed financial and operational reporting, providing data-driven insights for strategic decision-making.
- Developed and implemented an incentive and bonus program, boosting staff efficiency and productivity.
- Created a manual and training guide for multiple roles in the warehouse.

Warehouse Manager | *July 2014 – May 2015*

- Played a key role in the growth and development of a startup, contributing to new operational processes.
- Led shipping, receiving, and inventory teams, overseeing a staff of 10+ employees.
- Consistently exceeded efficiency and inventory management goals, optimizing workflow and productivity.

Warehouse Associate | *July 2013 – June 2014*

- Processed and shipped all same-day orders, ensuring daily cutoff was met.
- Received, scanned, and tracked incoming shipments from China, maintaining accurate inventory records.
- Conducted routine inventory checks and managed returns, inspecting products for damage and issuing refunds as needed.
- Performed batch testing for quality control, identifying and addressing defects before product acceptance.

Core Skills

- Excel and Excel-based automation – *Expert*
- SQL, Data Visualization (Tableau, Excel), R programming – *Intermediate*
- ERP and SaaS tools
- Data Cleaning & Transformation
- ETL Process with CRM and FTP tools
- Stakeholder Engagement & Ad Hoc Reporting
- Performance & Trend Analysis
- Operational Metrics & KPIs
- Data Modeling Collaboration

Education & Certifications

Grand Valley State University, B.S. (2010 – 2014)

Google Data Analytics Certificate