

JOHN BERGSEN

A Senior Financial Analyst with 10+ years of experience specializing in investment management, FPM, portfolio management, and financial reporting. A strong history of analyzing financial performance of multi-million-dollar investment portfolios.

123 Bridge Street,
Boston, MA 12345
j o h n b e r g s e n @ e x a m p l e . c o m
(123)456-7390

PROFESSIONAL EXPERIENCE

SENIOR FINANCIAL ANALYST

Rowan Investments Inc., Boston, MA
October 2016 - Present

- Design and implement reporting tools for enterprise business functions and investment management, create dashboards, and implement forecasting tools to enhance business transparency and drive data-driven decision-making
- Coordinate with C-level executives to review financial data and portfolio performance and define investment strategies based on financial forecasts and trends
- Lead transformation projects to centralize financial reporting for the integration of large acquisitions valued at \$30M-\$100M

SENIOR FINANCIAL ANALYST

Centerline Investing, Boston, MA
June 2011 - October 2016

- ◆ Led a team of five financial analysts to manage reporting activities for an investment portfolio valued at \$55M, which included identifying opportunities to enhance forecasting and improve data-driven decision making for investment strategies
- ◆ Oversaw all aspects of financial operations, including modeling, strategic planning, portfolio management, and cash flow analysis

EDUCATION

BACHELOR OF SCIENCE (B.S.) FINANCE

Boston College, Boston, MA
September 2007 - June 2011

KEY SKILLS

- ◆ Financial Plannings Analysis (FP&A)
- ◆ Investment Management
- ◆ Financial Reporting
- ◆ Financial Modeling
- ◆ Strategic Planning

CERTIFICATIONS

- ◆ Chartered Financial Analyst (CFA*), 2012