**SAT**

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**FINANCIAL PLANNING AND ANALYSIS | BUSINESS ANALYTICS | RISK MITIGATION| PROJECT MANAGER**

Dynamic financial planning and analysis (FP&A) professional with 12+ years of diversified experience across banking, health & auto insurance, and quasi-government sectors, fintech. Experienced in credit risk analysis and investment asset management with a solid track record of driving strategic financial initiatives that optimize performance and mitigate risk. Adept at leveraging analytical prowess to provide actionable insights for informed decision-making.

**AREAS OF EXPERTISE**

**Financial:** Financial Analysis, Strategic Planning, Forecasting & Modeling, Data Analysis, Presentation Skills, Automation & Efficiency, Financial Reporting, SAP for Finance, Communication, Software Proficiency, Finance Education, Risk Mitigation

**Languages:** SQL, Python

**Technology:** Azure DevOps, Wall Street Prep, Business Analytics, Oracle Enterprise Performance Management (EPM) Software – Hyperion Planning, Essbase, Smart View. Microsoft Office, Microsoft Excel, Jira

**Leadership:** Problem-solving, Presentation Skills,

# PROFESSIONAL EXPERIENCE

**Financial Planning & Analysis Manager *|*** Rhode Island Airport Corporation **|** Warwick, RI | *09/2023 – 04/2024*

* Produced comprehensive financial forecasts spanning next five years for the Airport's capital improvement endeavors, facilitating informed decision-making and resource allocation strategies, create business requirement documents for treasury business analysis.
* Collaborated with 10-15 Project Managers (PMs) and senior executives to integrate financial forecasting models into strategic planning frameworks, aligning Federal, State and Local project budgets totaling +$300 million with organizational objectives.
* Transformed purchase orders workflow with advanced financial forecasting models, streamlining procurement and achieving a 50-70% reduction in processing time, leading to notable cost efficiencies organization-wide.
* Delivered dynamic financial reports and performed real-time Key Performance Indicator (KPI) calculations for CEO, CFO, Vice-President of Finance & Controls executives, providing actionable insights crucial for high-level decision-making and strategic planning.

**Financial Planning & Analysis Manager** |Auto Insurance Policy Services Organization **|** Johnston, RI | *08/2021 – 09/2023*

* Meticulously managed financial forecasting models and SWOT analysis, ensuring alignment with organizational objectives through review by executive and board committees.
* Utilized advanced modeling techniques to construct financial scenarios projecting KPIs, achieving a 75-85% accuracy rate in forecasting revenue and gross profit, mitigating financial risks, and uncovering opportunities.
* Spearheaded agile projects automating finance operations to enhance budget management, yielding a +200% increase in efficiency and a 30-50% improvement in budget accuracy.
* Delivered impactful financial forecasts and recommendations to executives, guiding decisions and resource allocation while achieving a 10-50% increase in cost savings, reducing workflow process from 3 days to 3-4 hours.

**Financial Analyst - Business Systems |** I.T. Excel, Consulting Firm | Boston, MA **|** *02/2020 - 07/2021*

* Engineered an advanced sales and inventory monitoring system, leveraging tools like Tableau and SQL, resulting in a 20-25% reduction in turnover time and ensuring operational consistency.
* Played a pivotal role in a critical sales meeting, contributing valuable insights to expand market share by discerning and addressing customers' evolving needs through research & analysis to reach steady 2-3% monthly growth.
* Oversaw software engineers, business, developer’s cross-functional databases, facilitating seamless execution of 90-100% of business transactions, generation of CVS, Expedia customer reports, and effective communication of analysis across the organization leading to revenue increase by 10% and customer satisfaction rate with UI.

**Financial/Data Analyst - Business Development |** Carrier Corporation **|** Charlotte, NC | *07/2019 - 01/2020*

* Utilized SAP to model financial metrics, providing comprehensive support for worldwide sales by 80% increase in accuracy of sales forecast, competitive pricing strategies by 20% effective in comparison to industry average, and gross margin analysis initiatives that lead to cost-saving opportunities totaling $500 million.
* Offered extensive support to a multi-million-dollar executive global finance team, conducting thorough operating expense analyses to inform strategic decision-making processes resulting in an 8% increase in cost efficiency.
* Directed financial data analysis efforts in collaboration with energy efficiency contractors, key stakeholders, and utility counterparts, resulting $300 million in savings, ensuring alignment with organizational objectives and facilitating informed decision-making that overall contributed to 5-10% increase in project profitability.

**Financial Analyst - Finance Management |**Primerica **|** New York City, NY **|** *01/2019 – 06/2019*

* Provided comprehensive education to clients on personal finance and credit card management, leveraging personal expenditure tracking software applications to enhance financial literacy and promote responsible financial practices.
* Shared detailed financial models outlining step-by-step best practices for debt reduction and guidance on investing in secure opportunities, empowering individuals to achieve financial freedom and make informed investment decisions.

**Financial Analyst – Investment Banking, SME & Auto loans |** Kazakh Banks | Almaty, Kazakhstan | *06/2012 - 08/2017*

* Proactively generated and presented ideas at client meetings as a member of a deal team alongside senior bankers. Work closely with department of credit risk analysis and management for investment portfolio construction, compliance-control
* Supported transactions and client presentations through financial, structural, fundamental, and business risk analysis. Assisted with preparing financial models of enterprises’ credit worthiness based on financial statements and company age.
* Collecting commercial loan documentation for approval and risk mitigation to ensure business met general accounting principles. Communicated with commercial clients to discuss various options of credit cards to finance businesses’ working capital turnover.
* Supported Retail Banking Department through customer outreach, competitor research, documents collection for a loan approval.
* Informed clients about various auto loan terms, interest rate and conditions based on household income. Constructed loans portfolio, credit reports, offered financial insight and utilized risk analysis tools to assess borrower’s credit worthiness.

# EDUCATION

**Master of Science in Finance,** Johnson & Wales University | 12/2018

*CFA-Designated Coursework:* Financial Reporting, Statistics, Derivatives & FX, Risk Management, Equity & Bond Markets

**Bachelor of Science in Finance & Pre-Baccalaureate in Corporate Finance,** Narxoz University | 2017