# PAUL P. LEE

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## Profile

Finance/banking professional, with MBA degree, who has experience in financial services, banking, treasury management, and business finance looking for career growth and opportunities to expand overall business acumen.

## Education

**University of California, Irvine —** Masters in Business Administration (M.B.A.), with Finance, Strategy emphasis - June, 2014
**University of California, Riverside —** Bachelors of Science (B.S.), in Business Administration - June, 2005

## Experience

### ***Sr. Financial Analyst*, United Health Group (Irvine, CA) — Apr 2015-Present**

- Provide business financial strategy to CFO and senior leaders to help impact the company's financial position.
- Support client performance, perform rate & client analysis, review profit maximization, evaluate & monitor client profitability, prepare financial reporting, conduct financial reporting analysis, present information on client financial impact, identify profitability variances, provide variance analysis, review legal contracts, analyze RFPs, perform client audit, conduct error remediation, support post implementation reviews, and partner with key business partners to provide business financial support on various ad hoc projects.
- Involve with ad hoc reporting and strategy projects to help with process improvements, to provide business recommendations, and to manage resource support and overall efficiency.
- Prepares & manages monthly Client Metrics Report to provide financial reporting tool for accounting & FP&A teams, client management, and senior management.

### ***Sr. Treasury Implementation Consultant*, J.P. Morgan Chase (Irvine, CA) — Aug 2011-Apr 2015**

- Facilitated the overall implementation process of projects and treasury products. Worked with middle market commercial banking clients and internal partners to ensure timely delivery of treasury services and products. Provide consultative assistance to clients and internal partners on treasury products and implementation processes.
- Helped with the expansion/growth of the West market segment into a steady & consistent incremental business. Helped win new business, and retain existing.
- Helped with development of the international treasury lead/project management alignment model. Led process improvement initiative.
- Contributed to improving the cost & efficiency of the department by helping gather data to assist in developing an Activity Based Costing model/plan. Allocated transaction cost based on client profitability to evaluate accurate unit cost.
- Participated in the development of a new treasury product for a cross-border payment solution to meet the Dodd-Frank 1073 regulations for Government, and Financial Institution clients.
- Mitigated risk by proactively conducting peer audit reviews to improve the region's failure rates. Helped manage internal controls for team by adhering to policies & procedures.

### ***Treasury Solutions Analyst*, Bank of America Corporation (Pasadena, CA) — Apr 2008-Jul 2011**

- Facilitated and managed the pre and post sale process of treasury services sold to business banking clients. Operational sales support working with implementation teams to ensure complete client satisfaction with full delivery of agreed treasury services and products.
- Identified treasury and sales trends, analyzed client account activities and history, created sales pro-format and RFPs, managed sales pipeline, facilitated pre-implementation process, involved with post-implementation process, analyzed financial statements to prospect potential treasury opportunities.
- Helped increase treasury revenue of $4.3 million for the #1 Treasury Solutions Officer for line of business nationwide (2010).
- Contributed to the expansion and growth of the new divisions within the Client Development Group ($1 billion business in the firm's business banking sector).

### ***Credit Manager*, Wells Fargo Financial (Los Angeles & Simi Valley, CA) — Oct 2005-Sep 2007**

- Managed consumer loans, analyzed consumer credit reports to identify consumer loan opportunities, structured and sold consumer loan packages to sub-prime borrowers.
- Increased referrals by 45% and branch traffic by 30% by deepening the business relationship with local retail branches through "Check It Out" referral program.
- Improved branch's overall compliance performance by over 25% as Quality Assurance Captain (2007).

## Skills

- Financial analysis, financial reporting
- General accounting & finance knowledge
- Client performance management, build relationships
- Healthcare Pharmacy Benefit Management (PBM) industry knowledge
- Business & Commercial Banking experience
- Treasury management knowledge
- Project management skills
- Risk adverse, risk management
- Professional telecommunication skills
- Communicate effectively - strong verbal & written communication skills
- Proficient in Microsoft Word, Excel, PowerPoint, Outlook, and Access
- Proficient in Mandarin-Chinese
- Detail oriented, organized, meticulous, ability to multi-task & time manage
- Proactive, creative, problem solver, and self-motivated
- Analytical, decision making abilities
- Flexible - ability to work well in teams and independently
- User Acceptance Testing (UAT), and Agile project methodology

## Leadership/Accomplishments

- Blue chip project product owner providing business influence – ***2015 - Present***
- 100% Quality Audit Score for Commercial Bank, in process & tools categories – ***2014***
- Risk management 0.90% quality audit failure rate – ***2014***
- Multi-Currency Specialist (MCS) & International Treasury Project Manager pilot testing international aligned model – ***2012***
- “Top Treasury Solutions Analyst” award nationwide – ***2011***
- “Bank of America Global Recognition” award – ***2011***
- Single Point Of Entry (SPOE) implementation process & Global Fulfillment Online (GFO) implementation system pilot participant – ***2009 - 2010***
- Bank of America Assistant Vice President promotion – ***July, 2009***