

# CHRIS PEREZ

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**CAREER SUMMARY:** Financial associate with BS in Social Psychology and MBA. Associate possesses strong ability to analyze research and assess complex conundrums which include a wide array of variables. Former intelligence Marine consistently sees the job through until completion and possesses a variety of IT skills that have proven to be invaluable in financial services.

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|---------------------------|-------------------------------|--|
| ✓ BS in Social Psychology | ✓ MBA                         | ✓ Global Engagement                      |
| ✓ MA in Mgmt & Leadership | ✓ Series 66                   | ✓ Crafting Quality Partnerships          |
| ✓ Series 7                | ✓ Intelligence Analytics      | ✓ Evaluation of Resources for Operations |
| ✓ Presentation/Briefing   | ✓ Senior Management           | ✓ Process Driven                         |
| ✓ Link Analysis           | ✓ Financial Monitoring        | ✓ Product Enhancement Requests           |
| ✓ Team Leadership         | ✓ Classified Database Systems | ✓ Threat Finance                         |
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## PROFESSIONAL EXPERIENCE

### **AVP, Financial Solutions Advisor**    *Merrill Edge, Westminster, CA*    **Jul 15 to Present**

- Conduct in-depth reviews of clients' financial circumstances and future goals.
- Assist clients in making informed decisions.
- Negotiate with product suppliers for the best possible rates.
- Review accounts on a regular basis to ensure compliance with internal and external policies, guidelines, rules and regulations.
- Create, implement, and continually review a plan that includes strategies designed to help clients pursue their long-term goals.
- Devise and execute business development strategies to attract and acquire new clients.

### **Analytics Consultant 3**    *Wells Fargo, Irvine, CA*    **Feb 15 to July 15**

- Build, maintain, and validate complex financial tools (forecasts, financial models, and reporting solutions). Source data may come from a variety of sources including the Data Warehouse (Oracle-based through SAS) and the General Ledger (through Excel/Hyperion and Essbase)
- Continually improve the efficiency and accuracy of processes used by the finance team to compile data and deliver forecasts.
- Strategic analysis of subvention lending programs, SAS-based production reporting, and partner billing.
- Work collaboratively with Finance team and business partners to gather relevant information, interpret data, and develop recommendations.
- Provide excellent service at all points of contact with business partners.
- Ensure adherence to all regulations and policies.

### **Adjunct Professor (part time)**    *Park University, Camp Pendleton, CA*    **May 13 to July 15**

- Teach FI360: Financial Management: The role of financial management through the development of a framework appropriate for financial decision-making. Emphasis on obtaining and effectively utilizing the funds necessary for the operation of an enterprise. Elements of financial planning, capital budgeting, and consideration of alternative sources of funds.

### **Financial Advisor**    *Merrill Lynch, Long Beach, CA*    **Jan 14 to Nov 14**

- Conduct in-depth reviews of clients' financial circumstances and future goals.
- Assist clients in making informed decisions.
- Negotiate with product suppliers for the best possible rates.
- Review accounts on a regular basis to ensure compliance with internal and external policies, guidelines, rules and regulations.
- Create, implement, and continually review a plan that includes strategies designed to help clients pursue their long-term goals.

- Devise and execute business development strategies to attract and acquire new clients.

**Senior Financial Analyst     *Baker & Taylor, San Diego, CA***

**Sep 12 to Jan 14**

- Provides ad hoc reporting to the Publishers and the EVP of Publishing to help create title analysis regarding the cost of bringing in product from overseas.
- Maintains the Pub Board templates (publishing P&L's) to reflect the changes in the profitability ratios for each one of the 5 imprints. Conducts analysis for titles that have ended their life cycle (post-mortems), as well as profitability analysis, cash flow statements, balance sheets, & P&L's.
- Reduces the delays and amount of time that the publishing area spends in the maintenance of the title spreadsheet forecasting system. Assures that the formulas and financial ratios are working correctly.
- Streamlines the current publishing process by making improvements and keeping it efficient. Creates exception reporting to maintain checks and balances in the Publishing forecasting process.
- Conducts integration between Prophix 10 and the off-line existing financial and forecasting models.
- Guides cost analysis process by establishing and enforcing policies and procedures; providing trends and forecasts; explaining processes and techniques; recommending actions.
- Recommends actions by analyzing and interpreting data and making comparative analyses; studying proposed changes in methods and materials.

**Senior Operations Analyst     *Merrill Lynch, Laguna Hills, CA***

**Mar 11 to Apr 12**

- Served in an analyst capacity supporting the leadership executive team of Merrill Lynch Global Wealth Management in Southwestern Region of United States.
- Generated performance reporting metrics and initiative fulfillment. Reported to multiple functional lines of responsibilities, which allowed one to gain the expertise in execution of large-scale corporate environment spanning sales, compliance, and operations.
- Responsible for the day-to-day analysis, research, and production of comprehensive data/reporting. Functions included administering defined procedures, analysis, report generation, and exception processing.
- Responsible for conceptualizing and managing a diverse range of customer retention campaigns and initiatives. This includes idea generation and exploration, preparing and presenting proposals, overseeing the creative and production processes and championing successful execution.
- Working with customer service, marketing services and operation to develop and maintain a customer-focused attitude toward activities, concentrating on those that strongly contribute toward improving customer lifetime value.

**Intelligence Lead Manager     *US Marines, Camp Pendleton, CA***

**Jul 04 to Jul 09**

- Selected by the Senior Management to own and manage all classified training for a +1000 Marine unit
- Drove up the secret clearance rate of our +1000 personnel Group from 36% of to 82% inside seven months, significantly enhancing our warfighting capabilities
- Produced classified presentations and briefed Senior Management on high profile operations occurring in Afghanistan and Iraq, as well other "hotspots" on globally.
- Awarded Navy Unit Commendation medal for ensuring all critical deliverables were completed on time to maintain mission readiness.
- Part of terrorist targeting team which delivered 800 target packages were leading the apprehension of over 300 high valued individuals (HVI) while deployed to Operation Iraqi Freedom and overall mission success.
- Developed and implemented training program to teach intelligence analysis, thereby providing greater unit flexibility and capability
- Acted as the "eyes and ears" of a 30,000+ Personnel Group by providing ongoing extensive intelligence analysis on global operations and sensitive political situations driving up Group compliant effectiveness
- Briefed key Senior Management (Lieutenant General) weekly on classified intelligence matters ranging from the current situation in Iraq and Afghanistan, to new and innovative weapons systems currently being implemented in relevant areas.

**EDUCATION**

- Masters Degree, Webster University, Masters of Arts in Management and Leadership, Feb 2014
- MBA, Webster University, Masters of Business Administration, June 2011
- Bachelors Degree, Park University, Bachelors of Science in Social Psychology, May, 2009

## COMPUTER/ENTERPRISE APPLICATION KNOWLEDGE

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|-----------------|------------------------|-------------------|--------------------|
| ✓ MS Project    | ✓ MS Excel             | ✓ MIRC (chat app) | ✓ Analyst Notebook |
| ✓ MS SharePoint | ✓ MS Access            | ✓ SQL             | ✓ Prophix          |
| ✓ MS PowerPoint | ✓ C2PC                 | ✓ Falconview      | ✓ Skype            |
| ✓ MS Word       | ✓ BATS (analysis tool) | ✓ DTS             | ✓ GIS              |