

JULIO SANTIAGO

Local to Lenexa, KS | Available for onsite work |913.908.1591|

julio.s.santiago@gmail.com|www.linkedin.com/in/julio-s-santiago

PROFESSIONAL SUMMARY

Accomplished Senior Financial Analyst and Cost Management Expert with over 15 years of experience in financial modeling, budget analysis, and strategic planning across manufacturing, banking, telecommunications, and consulting industries. Proven track record in developing automated financial solutions that enhance decision-making and drive cost savings. Expertise in leveraging advanced Excel, Power Query, SAP, COGNOS, and Power BI to transform complex data into actionable business insights. MBA in Finance with CFA Level 1 Certification and a background in Chemical Engineering, combining technical expertise with strong business acumen to optimize financial performance and support strategic growth initiatives.

CORE COMPETENCIES

* Financial Modeling & Forecasting

* Cost Analysis & Variance Reporting

* Budget Development & Management

- * Data Analytics & Visualization

- * Process Automation (VBA, Power Query)

- * Strategic Planning & Analysis

- * Cross-functional Team Leadership

- * Executive Reporting & Presentations

TECHNICAL SKILLS

Advanced Excel (VBA, Power Query, Power Pivot) * SAP (ERP, BI) * COGNOS * Power BI * Crystal Ball * Microsoft 365 Suite * Financial Modeling * Activity-Based Costing * Data Visualization * SQL (Basic)

PROFESSIONAL EXPERIENCE

Publications Analyst

CPKC | October 2024 - Present

Engineered advanced Excel macros to automate data validation, reporting, and workflow processes, achieving a 70% reduction in manual workload and enhancing decision-making speed.

Directed cross-border teams across Canada, Mexico, and the U.S. to update 300+ commercial contracts, leveraging a custom-built tracking system that delivered real-time visibility and audit-ready accuracy.

Oversaw the cleansing and validation of large-scale datasets (50,000+ rows), deploying systematic QA protocols to ensure 100% data integrity across financial reporting and operational systems.

Spearheaded cross-platform data migration and consolidation between SAP and Excel-based systems, improving data accessibility and enabling seamless integration across business units.

Designed and implemented a robust Excel-based reconciliation model to validate 6,641 rates from 323 customer agreements and 22,218 rates from 30 tariffs, streamlining migration workflows.

Achieved 93% initial accuracy in rate conversion, systematically refined to 100% using iterative controls, reducing manual processing hours by up to 70% and improving data integrity.

Delivered weekly executive-level reporting and PowerPoint presentations, articulating technical outcomes and business impacts to senior leadership for informed decision-making.

Fostered cross-functional alignment among teams in Finance, Legal, Operations, and IT to ensure compliance, accuracy, and timely publication of revenue-impacting tariff documentation.

Developed an end-to-end automated pipeline using Power Query and VBA macros to extract, transform, and publish tariff data, enhancing operational efficiency and ensuring consistent external reporting.

Senior Cost Analyst

Thermo Fisher Scientific (Budget 0M) | May 2024 - June 2024

Provided financial modeling support for new product introduction (NPI) process, evaluating cost implications and ROI potential for proposed products.

Led all aspects of annual standard cost updates for North America region, collaborating with supply chain and sourcing functions to establish accurate materials costs.

Determined direct labor and overhead rates by working with site finance leaders and applying standardized methodology across all manufacturing sites.

Managed SAP ERP system updates and computed inventory revaluation adjustments, ensuring accurate financial reporting.

Prepared comprehensive year-over-year variance analyses for material, labor, and overhead costs, identifying cost-saving opportunities.

Senior Cost Analyst

Minted | October 2023 - December 2023

Partnered with Finance team to develop financial forecasts and provided insights for Senior

Management and Board of Directors presentations.

Owned key components of financial reporting and budget analysis for quarterly executive presentations.

Developed and maintained the annual strategic plan and operating budget, including daily sales tracking, supply chain cost modeling, wholesale revenue analysis, and artist commission calculations.

Created automated financial dashboards in Excel to analyze outcomes, provide insights, and identify growth opportunities.

Senior Cost Analyst

Take2 Consulting, LLC (Budget 0M) | April 2022 - February 2023

Designed advanced forecasting models to optimize FTE utilization and resource allocation, enhancing gross profit margins and identifying cost-saving initiatives.

Automated financial variance reporting through Excel VBA macros, reducing processing time by 65% and enabling deeper analytical focus.

Generated comprehensive monthly variance reports with actionable business insights that informed strategic decision-making.

Conducted detailed analyses on project revenue, gross margins, indirect costs, and net profits,

optimizing resource allocation across projects.

Developed a financial model in Deltek Costpoint to determine optimal gross profit by analyzing various resource combinations across projects and customers.

Pioneered advanced financial projection methodologies incorporating CAGR, regression analysis, and YOY moving averages, enhancing long-term planning capabilities.

Financial Analyst

Independent Contractor | August 2007 - February 2023

Created monthly dashboard reporting tools across multiple industries, conducting variance and trend analyses that improved strategic decision-making.

Developed compelling business development presentations that simplified complex industry metrics and facilitated fact-based decision-making.

Conducted comprehensive financial viability analysis of nationwide broadband services, informing budgeting and strategic planning efforts.

Innovated automated data-mining reporting systems using Visual Basic programming, delivering real-time analyses for management decision-making.

Key Accomplishments:

- * Wohner, Germany: Revolutionized production reporting system, increasing productivity and enhancing cost variance tracking for manufacturing.

- * Kansas Broadband Internet: Authored core financial model for successful grant application to the Broadband Technology Opportunities Program (BTOP), securing .7 billion in funding.

- * Sprint Mobile Media Network Analytics: Spearheaded market analysis for successful 5 million company launch, delivering key insights on market effectiveness and media ROI.

Senior Financial Analyst

Bank of America | January 2007 - July 2007

Pioneered end-to-end financial modeling for Activity-Based Costing (ABC), encompassing cost study surveys, cost objects, and capacity measurement modeling.

Established expertise in creating and applying innovative profitability metrics, including Customer Lifetime Value (CLV) and Cost Per Client analyses.

Led project management for seamless integration of ABC costing and Customer Profitability metrics across global subsidiaries.

Provided data-driven insights through in-depth analysis, guiding cross-functional teams in developing a unified ABC costing engine.

Financial Analyst II

Sprint Nextel Corporation (Budget \$25M) | October 2004 - January 2007

Developed and managed Corporate FP&A's 10-year financial projections used by executive leadership and board for strategic planning.

Conducted analyses on Customer Lifetime Value (CLV) and other profitability metrics to inform customer engagement strategies.

Secured over 25M in initial investment for Sprint Mobile Media Network project, successfully launching as a new subsidiary.

Served as financial lead supporting Business Development & Strategy groups, overseeing financial aspects of project lifecycle management.

Conducted rigorous financial viability assessments for new business initiatives, guiding them through executive approval processes.

Financial Analyst

CEMEX (Budget \$4.5B) | February 1997 - October 2004

Evaluated projects and asset acquisitions using discounted cash flow models, supporting investment decisions totaling approximately 0 million.

Analyzed competitor activities and financial performance, contributing to market share tracking and

M&A opportunity identification.

Collaborated with Logistics and Operations to assess alternative fuel usage, projecting 0 million in production cost savings.

Managed market-to-market operations, cash flow, and risk assessments for derivatives and financial instruments exceeding 00 million.

Developed automated debt profile system using Excel VBA, supporting management decisions for billion debt portfolio across international subsidiaries.

Conducted variance analysis on 00+ million in financial expenses, ensuring reconciliation with accounting and compliance with loan covenants.

Provided key financial data for quarterly reports used directly by the CFO in investor communications.

EDUCATION

Chartered Financial Analyst (CFA) Level 1 Certification * CFA Institute, Charlottesville, Virginia

MBA in Finance * European University, Antwerp, Belgium

Bachelor of Science in Chemical Engineering with Business Administration * ITESM, Monterrey, Mexico