

Max E. Grier

max.grier1@gmail.com | (253) 255-3752 | www.linkedin.com/in/maxgrier
13219 46th Ave SE Mill Creek, WA 98012

Education

MONTANA STATE UNIVERSITY, 2010 – 2015
Jake Jabs College of Business & Entrepreneurship
Bachelor of Science in Business Finance

Accomplishments:

Dean's List
Montana Investment Group – Co-Founder, President
Finance Club, CFA Institute Research Challenge

OREGON STATE UNIVERSITY, 2019 – Present
College of Engineering
Bachelor of Science in Computer Science

Accomplishments:

GPA: 3.9
Security Club

Work Experience

FINANCIAL ANALYST, The Boeing Company – Product Strategy & Future Airplane Development February 2019 – Present

- Responsible for maintaining \$55 and \$50 million in project funding for the Technology Integration and Advanced Materials portfolios, respectively
- Finished the year with a 0.25% budget variance
- Coordinate with Project Managers, Engineers, and Senior Managers to ensure accurate resource and budget forecasts
- Extract and compile weekly, monthly, and quarterly financial performance reports for Executives and Senior Managers
- Identify risks and opportunities as well as implement mitigation plans within various PS&FAD portfolios

RETIREMENT PLAN ANALYST, Northwest Plan Services May 2017 – February 2019

- Manage \$700 million in assets allocated across 22 plan assignments in collaboration with plan consultants and administrators within the retirement plan administration industry
- Retrieve daily price files from primary trust companies (Charles Schwab, T.D. Ameritrade, Matrix) to combine data and create compatible files to load into Relius database; export and submit aggregate trades for all plans; troubleshoot potential trade discrepancies via pre-trade checks; review and resolve outstanding trade issues for all NWPS locations prior to nightly deadline
- Track cash flow through daily reconciliation of plan assets on Relius database against trust company level, including participant, revenue sharing, gain/loss, and forfeiture accounts

BOOKKEEPER, Arnies Restaurant & Bar November 2016 – May 2017

- Maintained accurate and timely reconciliation of restaurant data: recorded daily sales, labor, and customer counts
- Collected and allocated tips to employees depending on position and work schedule
- Increased data precision and the ability to manage money from multiple accounts while maintaining reliable reporting

ENGLISH TEACHER, Sahamit Primary School (Thailand) September 2015 – March 2016

- Created unique lesson plans for Thai students ranging from 2-8 years old
- Focused on expanding students' vocabulary through games and exercises with the purpose of developing conversational English
- Increased ability to speak in front of large groups and manage strenuous situations with intense language and cultural barriers

RESEARCH ANALYST, Bridger Capital Management May 2014 – August 2014

- Conducted industry and company research used to complete equity analysis reports for publicly-traded companies
- Developed discounted cash flow models used for potential investment advice, requiring each report to be accurate, detailed, and completed in a timely and professional manner
- Performed Monte Carlo simulations to create multiple outcomes with assigned probabilities to incorporate numerous projections with high- and low-risk scenarios

STUDENT MANAGER, Montana State University February 2012 – May 2015

- Responsible for opening and closing registers and depositing cash bags into the safe
- Supervised employees and facilitated when necessary to optimize department operations

FINANCE OFFICER, Alpha Gamma Rho Fraternity January 2011 – January 2012

- Built and maintained \$70,000 budget utilizing Excel and Quicken with the result of reducing chapter expenses and member fees
- Responsible for accounts receivable and payable to ensure reliable cash flow, primarily paying organizational employees and other chapter expenditures and collecting membership dues

Skills and Interests

Software Applications:

Python, Oracle SQL, Crystal Reports, Visual FoxPro
Relius Administration Database System, Salesforce, Azure Cloud Interface
Microsoft Word, Excel (Pivots, Macros, etc.), Access, PowerPoint,
ASPPA Retirement Plan Fundamentals Certification, SCRUM

Activities:

Traveling, reading, writing, cooking, cycling, practicing Hatha Yoga:
200 Hour Hatha Yoga Teacher Certification – Rishikesh, India

Work Ethic: Self-motivation, agile and receptive to change, problem solver, take initiative and responsibility

Communications: Written and verbal, strong balance between independent work and team collaboration, liaison between team and upper management

Organization: Attention to detail, time management, ability to prioritize and meet deadlines under pressure

References available upon request.