

ROBERT THOMPSON

Senior Financial Analyst

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PROFESSIONAL SUMMARY

Over 8 years of experience in financial analysis and reporting has been acquired by this professional. Expertise in financial modeling, forecasting, and budgeting has been developed through work at major financial institutions. A track record of success in identifying cost-saving opportunities and optimizing financial performance has been established. Strong analytical skills are possessed and a detail-oriented approach is maintained at all times.

SKILLS & COMPETENCIES

- Financial statements were analyzed and interpreted on a regular basis
- Complex financial models were developed using Excel and other tools
- Budgets and forecasts were prepared with high accuracy
- Variance analyses were conducted and explanations were provided
- Recommendations for process improvements were made to senior management
- Financial regulations were complied with and best practices were followed
- Investment opportunities were evaluated and risk assessments were performed

PROFESSIONAL EXPERIENCE

SENIOR FINANCIAL ANALYST

Global Financial Services, New York, NY *June 2019 - Present*

- Monthly financial reports are prepared for executive leadership
- Budget vs. actual variances are analyzed and explanations are documented
- Financial models for new business initiatives are developed and maintained
- Quarterly and annual financial forecasts are created with 95% accuracy
- Cost reduction opportunities totaling \$2.3M annually were identified
- Business cases for capital expenditures are evaluated
- Ad-hoc analyses are performed as requested by senior management
- Junior analysts are mentored and training is provided

FINANCIAL ANALYST

Investment Partners LLC, Chicago, IL *August 2015 - May 2019*

- Financial performance of investment portfolios was monitored

- Monthly closing procedures were supported and financial statements were prepared
- Revenue and expense trends were analyzed and findings were reported
- Data from multiple sources was consolidated for management reports
- Financial impact of proposed operational changes was assessed
- Process improvements were implemented that resulted in 20% time savings
- A new financial reporting dashboard was developed and implemented
- Special projects were completed as assigned by the Finance Director

JUNIOR FINANCIAL ANALYST

Corporate Finance Group, Chicago, IL *July 2013 - July 2015*

- Financial data was collected and organized in spreadsheets
- The month-end close process was assisted with
- Basic variance analyses were performed
- Regular financial reports were distributed to stakeholders
- Data integrity in financial systems was maintained
- Documentation of financial processes was created
- Administrative support to the finance team was provided

EDUCATION

MASTER OF BUSINESS ADMINISTRATION

Columbia Business School, New York, NY *2011 - 2013* * Finance concentration was completed * A 3.8 GPA was achieved * The Investment Club was participated in

BACHELOR OF SCIENCE IN FINANCE

University of Illinois, Urbana-Champaign, IL *2007 - 2011* * A 3.7 GPA was maintained * The Dean's List was made for six semesters * The Financial Management Association was participated in

CERTIFICATIONS

- Chartered Financial Analyst (CFA) - Level II Candidate
- Financial Modeling & Valuation Analyst (FMVA)
- Advanced Excel Certification

TECHNICAL SKILLS

- Microsoft Excel (advanced features are utilized including pivot tables, VLOOKUP, and macros)
- Financial modeling software is proficiently used
- Bloomberg Terminal is operated with expertise
- SQL queries are written for data retrieval

- PowerBI and Tableau are employed for data visualization
- ERP systems are navigated with ease

LANGUAGES

- English (native proficiency is possessed)
- French (business proficiency has been achieved)