

Patrick Ryan Powell

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7929 Summit St. KCMO

Education

Missouri State University
Bachelor of Science, Finance

(August 2011 - December 2015)
Finance; Accounting; 3.21

Rockhurst University
Helzberg School of Management

(June 2018 – 2019)
Data Science

Work History

Reinhart FoodService
Purchasing Assistant

(August 2017 – February 2018)

- Purchased 221 Products from 22 vendors, managed inventory levels & communications between vendors, a centralized repurchasing team, sales representatives & customers
- Produced daily, weekly & ad-hoc Excel reports to measure sales, inventory levels & projected demand
 - Automated & standardized reports using Excel Templates, VBA & Power Queries
- Developed queries to extract, transform & load data from SQL & Oracle Databases into Power Bi, created data models & provided insights into the division's Perfect Orders and inventory shrink
 - Created a One Note Notebook & YouTube channel to train coworkers and standardize processes
- Administrative duties including confirming Purchase Orders, product pricing, & billing late truck fees

State Street Investment Servicing
Client Operations Specialist, Associate II -Temp

(February 2017 – August 2017)

- Provided supporting documentation in compliance with regulatory agencies to mark to market a branch of the PIMCO family of mutual funds
- Consolidated information from various sources including Bloomberg Terminals, Multi-Currency Horizon and web-scrapes to reconcile daily Net Asset Value with DST's Vision software
- Used Excel macros to reduce input errors & escalated debug issues to a designated team member
- Interacted with remote workers via instant messages and email to resolve issues

Waddell & Reed Financial Services
Customer Service Representative

(February 2016 - October 2016)

- Processed transactions & researched shareholder accounts in compliance with regulatory agencies
- Used DST's TA2000 and AWD software to maintain shareholder information and financial records
- Worked with Traditional, Roth, SEP & SIMPLE IRAs, TSAs, Qualified & 529 Plans
- Directed clients and advisors to the company's website & answered inquiries about plan details

Key Bank Real Estate Capital
Surveillance Intern

(Summer 2015)

- Monitored and evaluated the financial performance of income producing commercial properties that secured loans serviced by Key Bank
- Analyzed Operating Statements and Rent Rolls, noted changes in income, expenses, occupancy and client defaults and reported significant changes to management
- Researched and presented potential investments to senior management to grow the Loan Servicing and Asset Management department to \$150 billion by 2020
 - Gained familiarity with derivative securities and the IoT by researching Solar Securitization