Patrick Powell: Financial Analyst

**CONTACT INFORMATION**

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GitHub Profile: https://github.com/prp1277/

**WORK EXPERIENCE**

**REINHART FOODSERVICE - 08/2017 TO 02/2018**

Purchasing Assistant

\*Collaborated with stakeholders of various levels to develop solutions for the Procurement, Sales, Warehouse and Transportation departments

\*Compiled daily, weekly and quarterly reports to measure performance and forecast demand

\*Created Excel and Power BI dashboards to visualize data concisely and consistently

\*Automated dashboards using VBA, Power Query and Excel templates

\*Documented and distributed procedures and SOPs using OneNote

\*Technologies: Excel, Power BI, OneNote, SQL, VBA, Power Query

**STATE STREET INVESTMENT SERVICES - 02/2017 TO 08/2017**

Client Operations Associate II

\*Followed OneNote procedures and Excel Templates to produce client-facing reports compliant with regulatory agencies

\*Managed tight deadlines and quality standards for posting mutual fund NAVs

\*Recorded transactions to the general ledger and reconciled variances between multiple sources

\*Common transactions included interest rate swaps, rolling of treasury securities and repurchase agreements

\*Technologies: Excel, Access, OneNote, Bloomberg and 3270 terminals

**WADDELL AND REED - 02/2016 TO 10/2016**

Customer Service Representative

\*Received telephone inquiries from shareholders and financial advisors and provided timely solutions to their requests

\*Provided customer service and knowledge of investment products to stakeholders

\*Processed transactions to retirement and non-retirement investment accounts, FINRA Series 6 certification

\*Technologies: DST Vision, TA-2000, intranet portals

**KEY BANK REAL ESTATE CAPITAL - 06/2015 TO 08/2015**

Loan Surveillance Analyst Internship

\*Serviced non-consumer-based loans by analyzing the operating statements of the underlying business

\*Reviewed cash flows, occupancies, and rent rolls to assess credit risk

\*Conducted research on disruptive technologies and their potential investment opportunities

**EDUCATION**

**ROCKHURST UNIVERSITY - EXPECTED 2019**

Certificate

Business Intelligence

**MISSOURI STATE UNIVERSITY - 2011 TO 2015**

Bachelor of Science

Major: Finance

Minor: Accounting