**Patrick Powell**

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# **Summary**

# A financial analyst with a background in operations and a passion for improving processes.

# **Education**

**Rockhurst University**

Certificate, Data Science

Expected 2019

**Missouri State University**

B.S. Finance, Accounting Minor

Fall 2015 - 3.21 GPA

# **Employment History**

**Reinhart FoodService (August 2017 – February 2018)**

*Purchasing Assistant*

* Acted as the division’s Excel specialist, created easy-to-use templates using VBA and Get and Transform to measure sales, inventory levels and projected demand
* Took ownership of the weekly Perfect Order Report to trace and eliminate invoice errors
  + Decreased errors due to product availability by 34%
* Built, managed and maintained Excel and Power Bi dashboards to optimize inventory and provide insights to management
* Purchased 221 Products from 22 vendors, managed inventory levels and communications between vendors, a centralized repurchasing team, sales representatives and customers

**State Street Investment Servicing (February 2017 – August 2017)**

*Client Operations Specialist, Associate II - Consultant*

* Participated in a daily workflow to post transactions and maintain the general ledger for a family of mutual funds
* Documented procedures for processing transactions and validating data between sources
* Collaborated with a team of remote workers to ensure the client’s continual support
* 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 and escalated debug issues to a designated team member

**Waddell & Reed Financial Services (February 2016 - October 2016)**

*Customer Service Representative*

* Received telephone inquiries and provided support to shareholders and financial advisors
* Used DST’s TA2000 and AWD software to maintain shareholder information and records

**Key Bank Real Estate Capital (Summer 2015)**

*Loan Surveillance and Asset Management, Internship*

* Monitored loans serviced by Key Bank to ensure future cash flow and minimize credit risk
* Analyzed Operating Statements and Rent Rolls, noted changes in income, expenses, occupancy and client defaults and reported significant changes to management
* Researched and presented growth opportunities to the divisions managing directors