1. Complied with established internal controls and policies.
2. Executed core financial processes, including vendor setup and payment, operational expenses, administration of bank accounts and account reconciliations.
3. Identified improvement changes regarding key processes for internal controls and accounting procedures.
4. Created robust, diversified financial portfolios for clients.
5. Evaluated competitor data and statistics to develop business investment strategy and drive growth.
6. Developed forecasting tools to analyze revenue variance, business pipeline and industry trends.
7. Performed spending analysis and partnerships to refine policies and develop recommendations for improvement.
8. Improved overall financial reporting by streamlining control processes and reporting structures.
9. Protected company assets with strategic risk management approaches.
10. Developed budgets and strategic plans for day-to-day operations.
11. Evaluated [Type] applications against outline specifications to approve, reject or recommend adjustments files.
12. Resubmitted overdue invoices and contacted [Job title]s to determine when payments would be received.
13. Developed and administered annual budgets following analysis and research.
14. Funded [Type] initiatives by cultivating strong partnerships and stockholder relationships.
15. Drove industry-leading profit increase by transforming production process and aligning sales targets to meet dynamic industry conditions.
16. Reduced process discrepancies [Number]% by accurately maintaining performance reporting data systems.
17. Prepared budgets, cash flow projections, cost analysis and monthly, quarterly and annual reports.
18. Identified and capitalized on community business opportunities with effective networking.
19. Increased profits [Number]% by delivering investment management and financial planning services to customers to aid long-term goals.
20. Mitigated process gaps and managed all operational functions, including account openings, trades, documentation, regulatory compliance and marketing collateral.