

FINANCIAL SERVICES INDUSTRY SENIOR BUSINESS MANAGER / BUSINESS ANALYST

Accomplished senior business manager and analyst offering 18 years of experience, including nearly 10 years of progressive roles in many of the world's leading investment banks/Wall Street firms and early career in public and private accounting. MBA degree with economics emphasis and B.S. degree in accounting. Broad-based business acumen; rare blend of analytical skill, technological acumen, and management/leadership capabilities.

Innate talent for leveraging technology and automation to eliminate inefficiencies and optimize use of available information – freeing time to pursue larger-scale issues. Superior skill in translating complex and abstract ideas into sound, easily understood financial assumptions. Excellent leader skilled in managing people and processes and developing motivated, high performing staffs eager to take on challenges and working collaboratively to contribute to organizational vision. Qualifications include:

- *Large-Scale Project Management*
- *Middle Office Operations*
- *Process Reengineering*
- *Business Case Development*
- *Budget Planning & Allocation*
- *Management & Project Reporting*
- *Financial Reporting & System Development*
- *Workflow Documentation & Optimization*
- *Systems Requirements & Integration*

PROFESSIONAL HIGHLIGHTS

XXXXXXXXX BANK – City, ST

20XX – Present

VP/Business Analyst – Real Estate Mortgage-Backed Securities (RMBS) Middle Office (20XX – Present)

Transferred to round out background with product-side experience and tasked with developing and documenting the RMBS infrastructure and desk-level and cross-desk operating procedures and environment. Executed end-to-end review and documentation of operational workflows and infrastructure supporting various desks. Wrote desk-level operating procedures manuals. Documented business requirements for development of new Middle Office P&L reconciliation and reporting platform in the RMBS product space, teaming with Middle Office analysts and technologists on effort.

- **Helped resolve critical control and operational weaknesses**; identified problems, recommended improvements, and worked in collaboration with Middle Office, Risk, and Finance to implement issue resolutions.
- **Reduced operational risks and automated production and collection of key performance indicators** for production time and processing errors by reengineering key aspects of RMBS production environment.
- **Replaced and eliminated time-consuming manual process**, saving analyst 2 hours daily and dramatically increasing reporting capabilities by developing and rolling out new database that automated collection and reporting of P&L breaks to front office and operations managers.
- **Achieved or exceeded all position objectives**, applying attention to detail and methodical approach to fulfill goals. Brought fresh insight and leveraged talent for deriving simple solutions to complex problems to solve various operational problems and process inefficiencies.

VP/Business Manager – Global Structured Products Middle Office (20XX – 20XX)

Hired during period of 100%+ volume growth in business lines to assist in efforts to maintain control and oversight of business while enhancing operating scalability. Managed 4 analysts in business support and management of \$32 million budget. Oversaw budget development, allocation to business partners, management reporting (financials, project updates, hoshin metrics), and periodic compilation of industry operating surveys.

- **Worked on time-critical efforts to develop improved reporting infrastructure** and enhanced communications with support partners. Within 12 months, hired 2 new analysts, developed blue book with staffing and expense by product line, and conceived/initiated means to automate gathering of global activity-based costing reports.
- **Played key supporting role in technology enhancements and process reengineering** efforts through development of business cases and financial justifications presented to senior leadership. Introduced new approaches to presenting data that were well received and highly commended for intelligibility and clarity.
- **Developed and launched new activity-based costing system** that provided unparalleled transparency into global workings of the structured products middle office while automating business partner allocations and product-unit costing benchmarking (enabling completion in 30 minutes of work that had previously taken a full month).

XXXXXXXXXX BANK – City, ST**20XX – 20XX****VP/Business Manager**

Recruited by former manager at Xxxxxx to join Xxxxxx Bank and provide ongoing leadership for financial management and management reporting of a \$40 million technology development group charged with constructing a new web portal for institutional investors and portfolio managers.

- **Formulated financial rationale for development of 5-year, \$100 million web development** effort that would halt client base erosion while providing potential to private-label the product. Won senior-level approval of project.
- **Devised internal financial and reporting infrastructure for \$40 million group**, laying groundwork and creating foundation for providing management with monthly financial and project status updates.
- **Delivered \$2 million annual savings** and secured product knowledge base by conducting contract analysis to justify actions and converting several key developers from consulting firm.

XXXXXXXXXXXXXXXXXX – City, ST**19XX – 20XX****AVP/Financial Manager**

Joined firm to manage junior analyst and oversee plan creation and monitoring of \$80 million budget for Xxxxxx's global datacenter operations. Created comprehensive management reporting package well received by management. Produced monthly operations reports, detailing results against plan and providing commentary on various projects' status.

- **Collaborated with senior leadership team** to formulate plan under intense pressure to reduce costs; saved \$5 million annually by relocating a European datacenter to the U.S.

XXXXXXXXXX – City, ST**19XX – 19XX****AVP/Senior Analyst (19XX – 19XX) / Analyst (19XX – 19XX)**

Promoted and transitioned through 3 roles in 3 years. Initially hired to develop major expenditure proposals (MEPs) in support of trade floor technology group. During merger with Xxxxxxx, transitioned to support head of Global Technology through development of budget for \$100 million organization. Ultimately progressed into senior analyst role supporting global technology in the Finance organization.

- **Established new level of discipline in the MEP process** by instituting a detailed project reporting to ensure that projects were completed on time and within allotted budget; developed and sold several large-scale proposals for technology efforts on the NY trading floor.
- **Saved \$2 million in Market Data Services expenditures** on the NY trading floor by working with front-office management to reduce non-essential services and consolidate similar services to leverage volume discounts.
- **Implemented a large-scale time-tracking solution** for more than 350 associates in the global technology group, leading rollout and achieving 100% compliance within 2 months.

XXXXX INSURANCE COMPANY – City, ST**19XX – 19XX****Senior Accountant**

Supervised 3 accountants in production of GAAP financial statements for a \$40 billion Xxxxxxx Insurance subsidiary. Performed GAAP research and infrastructure development for initial conversion from statutory to GAAP reporting. Prepared books, records, and GAAP financial statements for 2 investment companies with \$400 million combined assets.

Early career (1988–1991) as Accountant with Xxxxxx and Company CPAs in City, ST. Prepared books, records, and corporate tax returns for corporate clients. Assisted clients and partners in dealings with the IRS.

EDUCATION & CREDENTIALS

M.B.A., Economics (19XX) - Xxxxxx University – City, ST

B.S., Accounting (19XX) - Xxxxxx University – City, ST

Technical skills

Advanced skills with Excel, Access VBA, and SQL; proficient with MS Word, Project, and Visio