Personal details

example@cvmaker.com
555-123-456

788 Tdub Blvd.
Las Vegas, Nevada, 88901

Summary of Qualifications

- Certified Financial Analyst - CFA Institute - 2014
- Providing well-researched quantitative financial reporting, ad-hoc analysis, and due diligence modeling to executive leadership.
- Exceptional data analysis processing and problem-solving skills and an uncanny ability to analyze KPIs and trends within the industry.
- Adapt to embracing new technologies and cloud-based statistical software solutions and tools to help streamline cash flow, chartered financial analyst tasks, and robust financial analysis.
- Reviewing financial statements, expenditures, overhead, financial management, investment banking, sales revenues, receivables, debt reconciliations, taxes, and applicable expenses.
- Developing customized spreadsheets and data charts to suit the needs of senior management.

Skills

- Analytical Thinking
- Creative Problem Solving
- Multitasking
- Organization
- Cloud Based Technology

References

Frank Jackson, CPA
Jappoz Shoes
On Request

Jessica Darling
Beltstone Tire & Rubber
On Request

Professor Steven Snapye
USC School of Finance
On Request

Clair Jackson

— Car sales

Confident and detail-oriented Certified Financial consultant with seven years of relevant work experience. Served as a CFA with two Fortune 500 manufacturing companies, reducing overhead expenses by 18 percent in 2019 and increasing profitability by 23 percent in 2020 and 2021, respectively. Exceptional time management, problem-solving, cash management, and analyzing debt reconciliations, taxes, and applicable expenses. Uncanny ability to communicate with stakeholders, vendors, and suppliers, while maintaining a professional and engaging demeanor at all times.

Professional Experience

Certified Financial Analyst

Aug 2017

Jappoz Shoes - Henderson, Nevada

Served as the team lead Certified Financial Analyst for Jappoz Shoes, a Fortune 500 manufacturing company based in Henderson, Nevada. Managed a team of six financial planners, CPA's, and legal experts to provide structured financial guidance for the company. Key accomplishments include:

- Collected analytical data from manufacturing, overhead, fulfillment, R&D, taxes, and marketing to create easy-to-review yet robust reporting that resulted in a reduction of overhead by 18 percent, and increased profitability by 23 percent.
- Developed and activated policies, controls, and procedures that maintained profitability, improved manufacturing lead time, and accelerated business growth during the COVID-19 global pandemic.
- Managed financial analytical review of a business with $7.89 Billion in annual sales - with a gradual average uptick in sales of 6.6 percent during 2018, 2019, 2021, 2021.
- Created cloud-based reporting tools for eight, individual departments to submit payroll, overhead, inventory, and accounts receivable. Implemented training program for over 350 employees of a diverse educational and technical background.

Certified Financial Analyst

Sep 2014 - Jul 2017

Beltstone Tire & Rubber - Los Angeles, California

Served as a Junior Certified Financial Analyst for Beltstone Tire & Rubber regional corporate office located in Los Angeles, California. Worked with a team of 27 corporate CFAs to provide weekly, monthly, quarterly, and annual fiscal reports to key stakeholders and upper management. Key responsibilities included:

- Compiled KPI reports for seven company divisions.
- Tabulated and analyzed monthly Profit and Loss statements, cash and accrual reports, gross margin, cost of goods, and multiple overhead expenses.
- Prepared weekly reports to analyze financial goals, department payroll expectations, accounts receivable, shipping and logistics, travel & entertainment, and total profitability.
- Worked with corporate senior CFAs to adjust annual forecasting on a global, national, and regional basis.

Education

Master's in Finance

Sep 2012 - May 2014

University of Southern California School of Finance - Westwood, California

Certified Financial Analyst

May 2014

CFA Institute - Westwood, California