

# JOHN DOE

You're Hired, VA • (555) 555-5555 • John.Doe@yourdomain.com • LinkedIn URL

## FINANCIAL ANALYST

Results-driven finance professional offering expertise in data analysis, forecasting, and portfolio management. Known for initiating process improvements that reduce cost and increase productivity.

### Areas of expertise include:

Risk Assessment • Financial Reporting • Client Relations • Statistical Analysis • Accounting • Asset Management • Profit/Loss Analysis • Advanced Microsoft Excel and PowerPoint

## PROFESSIONAL EXPERIENCE

ABC COMPANY, YOU'RE HIRED, VA

19XX –Present

### *Financial Specialist (20XX – Present)*

- Manage 100 company clients across 35 industries; establish high-trust relationships to customize investment strategies, negotiations, and portfolio management.
- Quickly learned proprietary reconciliation software and can now reconcile 80 balance sheet accounts every month, including research and resolution of outstanding items.
- Reduced annual business expense of \$20K in less than a year through application of expense budgeting and forecasting models using Excel (VLookup, Pivot Tables, and Formulas).
- Provide monthly updates to Executive Management through PowerPoint presentations to identify performance indicators and explain variance analysis.

### *Financial Associate (19XX – 20XX)*

- Designed a pivot table to identify and analyze problem loans; resulted in streamlining loan performance tracking, and improved company audit rating by two levels.
- Created trade status tracking system through financial management system, which implemented an automated process for 100 member team; Resulted with increasing team productivity by 20%.
- Promoted to Financial Specialist within 2 years along with receiving various company recognitions: Top 20 Financial Representative Nationwide, New Client Award, and Bronze Award.

## EDUCATION AND PROFESSIONAL DEVELOPMENT

**Masters of Business Administration, 20XX**

American Public University System, Charles Town, WV

**Bachelor of Arts, Economics, 20XX**

University of Florida, Gainesville, FL

**Chartered Financial Analyst (CFA) Level II Candidate**

**Licenses: Series 7 and Series 63**