
Financial Analyst ~ Financial Management Analyst

Competent, adroit & detail-oriented professional, with excellent educational background and proven expertise in understanding the business, finance and technologies of the company. Proven strengths in determining & documenting enterprise wide risk management procedures for an organization, and identifying Key Controls points. Proven expertise in developing policies pertaining to cross-cutting issues and recommending improvements to Management. Deft in providing technical assistance and managing reviews of foreign investment. Core strengths in analyzing and formulating macroeconomic, financial market, and business development policy.

Demonstrated strengths in reviewing and evaluating financial operations and methods and planning special projects addressing a broad range of financial management program areas. Proven ability in developing and implementing sound, value-added financial management policies, procedures and systems to enable the organization to strengthen internal controls. Capability in reviewing, consolidating, and prioritizing new funding initiatives and continuations of funding. Proficient in conducting budget analyses, formulation, and execution; identifying and reporting fiscal irregularities and inconsistencies.

Demonstrated capability to conduct quantitative analysis of program costs; planning and coordinating cost estimates; and performing analyses of budget requests. Exceptional ability in developing procedures to implement budget processes, policies, regulations. Thrive in a deadline intensive environment, multi-task, perform under pressure and meet deadlines. Exceptional motivating skills and ability to work under pressure singly or in a team and think/act strategically to achieve win-win outcomes. Strong oral and written communication skills. Computer proficient with good knowledge of Morningstar Research & Analysis, and Profiles Professional Planning Softwares.

PROFESSIONAL VALUE OFFERED

Research & Analysis ~ Investment Management ~ Financial Analysis ~ Financial Planning ~ Risk Management ~ Portfolio Management ~ Data Definition ~ Project Management ~ Policy Analysis ~ Program Evaluation ~ Corporate Finance ~ Need Assessment ~ Negotiation ~ Quantitative/Qualitative Analysis ~ Advisory Services ~ Market Analysis ~ Internal Control ~ Relationship Management ~ Retirement Planning ~ Training & Development ~ Documentation/Reports ~ Team Management

PERFORMANCE MILESTONES

■ Won MetLife "Rep of the Year" Award for 3 consecutive years within the agencies 4 year class advisors. Devised effective strategies for managing and enhancing the agency book of business consisting of individual and institutional insurance and investment clients valued at \$100 M + in assets under management. Nominated for 2007 MetLife Leaders Conference Award for Outstanding Sales and Service.....

■ Actively involved in refining departmental operating policies and procedures. Designed & developed Summary Plan Descriptions (SPD's) to ensure ERISA compliance. Conducted 'SWOT' analysis and utilized findings for designing customized strategies to enhance customer services. Distinction of presenting retirement seminars to employees of institutional business clients.....

CAREER PROGRESSION

Financial Planner,

- Proactively contribute in nurturing relationships through providing fee based financial planning services and designing solutions to individuals, families and businesses within a boutique firm managing assets over \$100 million.
- Lead & guide team in properly aligning industry products and services with client needs and objectives.
- Pioneer in conducting research and analyze company/industry/economic/political news/market activity to keep clients informed of changing economic environments.
- Pioneer in coordinating briefing material and negotiating positions with other offices.
- Recognize for representing the Department at inter-departmental and national/international meetings.
- Regularly monitor current international financial and economic thinking and updated top Management with new developments.
- Successfully organize educational seminars and workshops to employees of non-profit organizations and other professional groups.

Finance Advisor –**Financial Advisor / Agency Retention Manager,**

- Played pivotal role in developing capacity of team members to effectively manage \$20M+ in current and future grant funding, adhere to acceptable accounting practices of the DOS as well as prepare staff for future external audits.
- Associated closely in performing a wide variety of analytical and administrative duties including formulation, justification, presentation and execution of the financial management program.
- Conducting gap analysis and gathering functional information to integrate inputs for bridging gaps.
- Proactively contributed in conducting an internal cash flow audit to identify and advise senior management on the efficacy of operations, the reliability of financial reporting, deterring and investigating fraud, safeguarding assets, and compliance with laws and regulations.
- Solely responsible for reviewing and analyzing program proposals, plans, audit reports and studies for their financial impact upon the organization.
- Contributed significantly in developing SOP's for proper bookkeeping, forecasting, tracking budgets, cash management, and financial reporting.
- Actively engaged in identifying financial management needs including establishment of fiscal policies and procedures, and cost accounting and documentation requirements.
- Implemented the concept of MIS reporting of mission progress to U.S. military and Iraqi government officials.
- Accountable for building customized investment portfolios for high net worth clients.
- Developed plan to implement new controls and related testing, and established monitoring plans.
- Judiciously reviewed current and proposed legislation and regulations to identify requirements and potential impacts on Dept. and programs, processes, and systems.
- Geared the activities to develop relevant program goals, objectives, policies and procedures.

**Junior Financial Advisor,
Retirement Plan Services Consultant,
Senior Retirement Plan Specialist,**

- Instrumental in researching equity and fixed income investments for portfolio design.
- Drove initiative in reviewing and analyzing new and existing client portfolios for initial construction and rebalancing.
- Significantly contributed in the establishment of retirement start-up and conversion plans.
- Drove the efforts in developing new capabilities and formulating applicable policies to ensure accountability of funds, internal controls in conformance with government-wide financial management and fiscal requirements.
- Solely responsible for implementing projects and meets performance measures defined in the strategic plan, annual performance plan, and other related plans.
- Judiciously reviewed internal control procedures for operational systems, identifying weakness and recommended improvement.
- Identified key project risks and structured project scheme for mitigating the same.
- Organized various training sessions for the team to enhance their performance.
- Provided interpretation and implementation of new policies, regulations and procedures.
- Assumed responsibility for monitoring Employer 401(k), Profits Sharing, and Pension Plans.
- Formulated plan to ensure all types plans comply with ERISA requirements.

EDUCATION**CERTIFICATIONS**

- Series 6,7,63 and 65
- Life and Health License
- Certificate of course completion for Certified Financial Planner designation (Result awaited).

References and verifying documentation furnished upon request