Robert Smith

Financial Systems Analyst

CONTACT DETAILS

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PERSONAL STATEMENT

Seasoned Financial Systems Analyst with 7 years of experience improving business processes for global organizations within financial services. Adept at optimizing investment compliance, portfolio management, trading, portfolio accounting, CRM, and other business-critical systems for internationally distributed, 24/7 operations. Dynamic communicator and former software engineer, an expert at collaborating across business units, working with all levels of management.

WORK EXPERIENCE

Financial Systems Analyst

Center For Infectious Disease Research - 2014 – May 2018

Responsibilities:

- Effectively coordinated and managed a wide range of financial projects to support federal and private foundation grants, federal and corporate contracts, and scientific portfolio management.
- Automated lab projection processes by replacing the manual entry with a series of summary reports driven by pivot tables drawing information from the data warehouse.
- Collaborated with IT to create and streamline a wide range of information stored in our data warehouse.
- Helped the Project Managers, Budget Managers, and Program Coordinators to more easily retrieve the information needed to stay on target while tracking award funding.
- Supplied multiple types of financial reports which included additional analysis of IDC rate, fringe rate, and budget variances, to the office of sponsored research to meet NIH reporting requirements.
- Liaisoned to Project Managers, Budget Managers and Program Coordinators where accounting knowledge is indispensable. Supplied complex transactional detail for cost transfers.
- Trained and provided ongoing support to principal investigators and research support staff on financial systems, ensuring comprehension of expectations and protocols.

Financial Systems Analyst

Center For Infectious Disease Research - 2011 – 2014

Responsibilities:

- Constructed process for the operating budget from departmental templates through financial system upload.
- Increased organizational-wide access to financial and key metrics reporting, by developing interactive reporting tools via the use of a new user interface (tableau) in coordination with all end-users.
- Took on projects, such as account code controls during periods of management turnover.
- Trained and advised staff on financial systems during these periods.
- Managed projects status with SharePoint to keep teammates updated and a better understanding of project status thus, improved

SKILLS

Adobe, Administrative Support, Management, Communications, Employee Supervision, Forecasting, Financial Modeling, Reporting, Financial Reporting, Financial Statements, General Ledger, Monarch, Oracle, Jd Edwards, Quickbooks

LANGUAGES

English (Native)
French (Professional)
Spanish (Professional)

INTERESTS

Climbing
Snowboarding
Cooking
Reading

REFERENCES

Reference – 1 (Company Name)
Reference – 2 (Company Name)

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communications.
- Assisted month end processes, verified the exported data is accessible and stored in DSS.
- Understood internal processes to identify potential automation to improve productivity.

Education

Accounting - 2010 (EMPIRE BUSINESS COLLEGE - Santa Rosa, CA)

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