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**SUMMARY**

**Financial Management, FP&A, Strategic Workforce Mgt, Operations Transformation Process/Influencer**

**Financial Business Manager experience in planning, budget, & analyses including transformational change across enterprise-wide Financial, Technology, and Business Operations.** Solution Specialist Provider in restructuring, integration and rationalization of finance and technology functions to enable scaling of the Business. (i.e., Shared Service Model) Improve profitability, allowing better decision-making by augmenting data analytics and business intelligence solutions. Achieve automated robust dashboard reporting and illustrations capability to enable better decision-making by C-Level and Business Stakeholders. Experience in Investment Banking, Insurance, and Manufacturing industries.

Demonstrates the ability to drive change by creating a strategic framework to support implementing new ERP financial systems (i.e., SAP, Oracle, Peoplesoft), data analytics sourced from Data Lake & Business Warehouse, reporting automation, and process improvement solutions. Identify tactical solutions, including integrating financial with non-financial data from disparate systems across complex organizations (i.e. SAP, Workday, P2P, ServiceNow) where capital investment constraints exist. Build trust and compel C-level, Finance, Technology, Business Revenue Generators, and HR to embrace adaptation.

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| * Financial Management
* Technology Business Management
* Cost Transparency & TCO
* KPI & Metric Driven Methodology
 | * Business Taxonomy Design (TBM) & Implementation (i.e., Apptio)
* Strategic Program & Project Mgt
* Transformation & Process Improvement
 | * Data Analytics & Business Intelligence
* Client & Product Profitability
* Financial Modeling ROI & EBIDA Analyses
* Digital, Data and Product organization
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EXPERIENCE

**ELANCO ANIMAL HEALTH GLOBAL (Remote) 2020 – to present**

(Senior Consultant) Enterprise Financial Business Management & Process Change Improvement in Technology Division

* Created functionality designs and managed the development of a TBM Cost Transparency & Allocation application, which presented “real time” technology costs categorized by a standard external taxonomy to understand spend and enable data driven decisions.
* Integrated ERP Financial data with data down streamed from other systems (i.e., Ariba P2P, Azure/Google Cloud, ServiceNow, Workday) to provide cost transparency, consumption-based information to understand IT costs by service & purpose. Supported benchmark (Gartner) and KPI analytics aligned with best practices.
* Developed bespoke dashboards for Business and Technology leadership, accelerating financial maturity within nonfinance functions to understand the Cost of IT services and Total Cost of Ownership "TCO."
* Streamlined the efficiency in creating accurate budgets, forecasts, and automated variance analyses.
* Focused on enhancing ITFM financial reporting across Technology and Corporate Finance tailored to all audiences through streamlining twelve work-stream processes to achieve control, accuracy, and efficiency (i.e., Procurement P2P, Accruals)

*\*\* Technology Business Management “TBM” Council (Apptio Sponsored) 2022 Finalist for the IT Financial Leadership Award*

**MS FINANCIAL & BUSINESS CONSULTING, LLC, New York, NY 2019 – to present**

**Finance, Business & Tax Consulting**

Focused on finance, technology, and underlying operations for various clients in banking, manufacturing, healthcare, real estate land development, and other service industries. Enabled investment decision-making and optimized company spend to maximize profitability through Corporate Tax strategies.

Provided forward-looking financial views and cash flow modeling to support investment decisions in increasing net worth valuation.

 WELLS FARGO, New York, NY 2017 – 2019

(Senior Consultant) Enterprise Financial Business Management & Process Change Improvement in Technology Division

* Spearheaded the strategic financial transformation across Enterprise Technology organization to improve cost transparency and management control through implementing solutions across a de-centralized and matrix Technology organization.
* Enhanced project management costing through improved project portfolio structure and process, increased quality of time & expense recorded against project tasks to achieve accurate costing and allocation to Business LOBs reflected in Qlik -generated dashboard reporting. Enabled Technology and Business Partners to view current and historical costs at a granular level not previously available—increased cost transparency validating project plans, milestones, and the accuracy of allocated resource contribution costs.
* Created specifications design document for capturing data from Data Warehouse Databases to support robust cost reporting in QLIK. Apptio BI implementation leveraged this Data table & field mapping.
* Designed an "end-to-end" operating process to improve financial management and governance of multi-millions in Statement of Work contracts, including integration with financial payable payment ledgers. Prevented duplicate payments to vendors, ensured approved contract limits were not exceeded, and improved forecasting accuracy.

COMMERZBANK, New York, NY 2013 – 2016

(Senior Consultant) Head of Finance and Control in Technology Division

On-boarded to enhance financial management control and reporting. A comprehensive approach advanced what was to be a modest reporting objective into an enterprise-wide transformation initiative focused on cost transparency to achieve expense optimization in the Technology Division and with Business Partners (Trading, Operations, Finance)—identified multi-millions in cost reduction.

* Increased governance and accuracy of all financial management reporting (Multi-Year Strategic Plan, Budget, Forecast, Variance analyses, Allocations)
* Conceptualized Strategic roadmap for Cost Transparency initiative with Business Partners and Technology. It resulted in a collaborative partnership with the Business to achieve cost reduction and a re-baselined priority of technology spending.
* Designed and created financial models sourced from Oracle GL, Data Warehouse Databases, and other disparate systems (i.e., Time Mgt) with dashboard reporting & supporting metrics to tune technology services, aligned Technology initiatives with Business revenue, regulatory, and risk objectives. This new capability enhanced partnership with Business Leadership and all back-office support functions.
* Directed an effort to create storage, server, and database inventories aligned with Business consumption to support allocation accuracy. Improved transparency and identified opportunities to optimize Infrastructure costs.
* Defined new allocation methodologies to allocate expenses accurately, resulting in Business changes in operating practices. Reduced costs by changing Equipment Life Cycle management practices, including resale of used equipment.
* Developed Intercompany Allocations Methodology framework to ensure fair allocations impacting Business Product Line P&Ls while understanding consumption. Change in methodologies embraced and applied by Commerzbank Group in Frankfurt and other EU regions.

CREDIT SUISSE, New York, NY 2007 – 2013

Chief Operating Officer for Global Fixed Income Technology Group

Managed financial and operational functions with a $225MM budget and 850+ resources.

* Provided leadership and direction to the Technology Management Team by creating financial models to improve workforce resource management, critical hiring control, off-shore and near-shoring deployment, and outsourced vendor consulting to optimize spending.
* Teamed with Project Management Office PMO in monitoring the execution of application development programs/projects plans, costs, and delivery during the project life cycle (AGILE, SDLC) to ensure projects were delivered on time and within budget.
* Integrated PMO portfolio human capital resource demand and program delivery plans with monthly cost accounting reporting. This innovative approach improved accuracy in budgeting and forecasting.
* Analyzed end-user functionality requirements for the new enterprise Project Portfolio Management system**.** Designed financial and project management reports to prioritize projects, ensure all projects support the overall business objectives of the enterprise, and report project progress, including financial information, to executives and stakeholders.

**CREDIT SUISSE, New York, NY 2001** – **2007**

Financial Business Manager for Global Technology COO Group

* Conceived and directed a cost transparency initiative across Technology to support Global CFOs and COOs in Investment Banking, Private Equity, and Equity Research Divisions to understand app development and infrastructure costs. Identified cost drivers and facilitated meetings with Business Stakeholders and Technology owners to validate service alignment with bank strategic growth strategies while identifying cost efficiencies.
* Reduced IBD Division expenses by $70MM over a 1½ year period.
* "Face for Technology" during the transformation from a vertical silo to an enterprise shared service organization.
* Member of a Strategic Task Team that created the Technology Division's first global "PMO" function, managing $1.5BB in global application development initiatives/projects. Streamlined process simplified prioritization of strategic initiatives "Ask" with Business Stakeholders and enabled budget rebalance. Directed "roll-out" and communicated training to 150+ global managers.
* Improved methodology to cost-up and chargeback costs to IB Businesses, achieving P&L integrity to support C-Level leadership decisions.
* Defined and created specifications for the Time Management reporting system, which supported project costing unavailable from conventional general ledgers.

ALLIED INSURANCE BROKERAGE OF NORTH AMERICA, Jericho, NY 1998 – 2001

(Acquired by AON Insurance Services)

##### **Chief Financial Officer**

* Managed all functions of financial management (MYP Budget, Forecast, Internal & External reporting, Cash management, Tax, and Audit) entailing 65 staff in Finance, Technology, & Insurance operations.
* Partnered with President to achieve a Strategic Business Turnaround. Applied business model optimization strategies to fundamentally redesign the operating models of businesses that were not profitable, carefully considering products, client segmentation, delivery, and service requirements to deliver a distinctive client experience.
* Designed and established a centralized "Shared Service" insurance operation to service all back-office functions for divisions located across the US. Directed the re-engineering & streamlining of insurance operations. Sharpened focus on new business and client service resulting in a 25% reduction in costs. Eliminated processing of insurance policy renewal backlog which reduced operational and financial risk.
* Directed the implementation of a new insurance application system into all profit centers with a "Top-Down" and "Bottom-Up" approach. Drove adoption of OCM/OR roadmap and transition demanding continuous company-wide communication at all levels. Collaborated closely with the vendor to modify functional software requirements to support re-engineered workflow processes.
* Increased net profit through business acquisitions. Integrated acquisitions and start-ups both from a financial and operational standpoint. Performed due diligence for company acquisitions and roll-ups. Developed IRR valuation models to support acquisition price and rate of return objectives.

**OTHER COMPETENCIES**

Strategic Business Planning, Budget & Forecasting, Procurement Management (VRM), CAPEX, ROI & Metrics (KPI), Expense Optimization, Cost-Benefit Case analysis, Operational Risk Management, Systems Business Analysis & Report Generation Design, Financial System Implementation (Oracle, SAP, PeopleSoft), Prosci ADKAR Model, Business Intelligence Strategy & Database Implementation, Apptio, SmartView Hyperion Essbase, Tableau, Qlik

# EDUCATION & CREDENTIALS

Adelphi University, Garden City, NY.

B.B.A. in Accounting, *Cum Laude*

Certified Public Accountant, New York State (active)

Advisory Board Member, Adelphi University Graduate Master Programs

College Student Mentoring Programs, Adelphi University (active)

TBM (Technology Business Management) Council – (active); member of Banking Working Group 2020/21