

Finance Consultant

INDUSTRIES: • FINANCIAL SERVICES • INFORMATION SERVICES • CONSTRUCTION • NONPROFIT/EDUCATION • INSURANCE • HR

■ **Entrepreneurial, Value-Focused Finance Business Partner** with accomplished 14-year record of shaping and enacting sound business and financial strategies that optimize performance and profitability. Proactive in contributing finely honed tactical leadership, financial expertise, analytical agility, and data-empowered decision support.

■ **Decisive Planner & Manager** controlling multimillion-dollar budgets; keeping all project elements moving forward to timely completion and production of top-quality deliverables; reliably outlining comprehensive plans and clearly articulating realistic expectations.

■ **Resourceful Team Builder & Coach** fostering a positive culture of knowledge sharing and continuous learning; collaborating across multidisciplinary resources; and readily discerning and supporting fulfillment of staff needs and motivations to empower highly engaged teams.

■ **Expert Data Storyteller** employing advanced Excel and PowerPoint skills, along with knowledge of brain processing and learning theories to create visually appealing, easy-to-understand decks, dashboards, and spreadsheets that illuminate human and hidden aspects of financial metrics.

AREAS OF EXPERTISE

Financial Planning, Analysis & Reporting • Balanced & Insightful Consulting • Strategic Advisement & Decision Support • Budgeting & Forecasting • P&L Accountability • Business Intelligence & Analytics • Financial & Growth Modeling • Operational Excellence • Cost Reduction & Avoidance • Strategic Partnerships & Alliances • Team Leadership • Cross-functional Collaboration • Process Engineering • Performance Metrics • Continuous Improvement

SELECTED ACCOMPLISHMENTS

- ▶ **Delivered \$50M+ in savings when handpicked by financial executive as Finance Lead on a multi-year offshoring project.** | *WK*
- ▶ **Lowered back office processing costs 50% by marshaling a 20-person cross-functional team initiative.** | *Discover*
- ▶ **Directed a team of 5 in executing an accounting system deployment for a \$16M Microsoft contract.** | *AH*

PROFESSIONAL FINANCIAL LEADERSHIP EXPERIENCE

NewCastle Finance, Northfield, IL

Managing Director | 2019 – Present

Started up and operate a thriving financial consultancy firm offering fractional CFO services along with financial, operational, and process efficiency solutions to small- and mid-sized businesses nationwide. Organize and spearhead all operational, technical, business development, and financial factors to ensure maximum customer satisfaction, sales, and profitability.

Accomplishments

- Accelerated business productivity by 90% in less than a month for a large construction company in Florida by digitizing and automating divisional financial reporting and operations.
- Aided startup in capturing lucrative funding by authoring a financial model with 5-year cash flow projections.

Discover Financial Services, Riverwoods, IL

Finance Lead – Consumer Banking, Student Loans Operations (SLO) | 2017 - 2019

Played integral role in advancing operational efficiency and elevating customer experience while helping annual budgeting, forecasting, long-range planning, and reporting for a \$44M SLO organization. Consulted with executive management and HR team to determine current and emerging business needs. Worked closely with a team of business leaders to define protocols, establish systems, and automate processes.

Accomplishments

- Recommended and won support to retain temporary business model after assessing efficiencies, cost savings, and potential incremental revenue generation of utilizing tenured agents over temporary resources during peak seasons.
- Realized \$600K in annual savings by removing excess benefit allocations from budget after securing buy-in from business leadership.

- Boosted business productivity 30% by incorporating scorecards and executive summaries when revamping monthly business readouts and forecasting reports.

Wolters Kluwer NV, Riverwoods, IL

Finance Manager – Global Shared Services | Senior Financial Analyst | 2011 - 2017

Informed and spurred change by offering data-backed insights to global executive team. Devised and delineated short- and long-term strategic development and cost efficiency plans for \$85M budget. Oversaw execution of 60 executive cost centers with \$35M annual budget and 320-person staff. Orchestrated all financial and accounting month- and year-end processes, including accruals and reporting packages.

Accomplishments

- Originated and honed distribution methodologies for \$46M+ of allocated shared services, including costs associated with strategic sourcing and offshoring initiatives.
- Decreased Treasury cash flow analysis processing time from one week to 1.5 days with an automation effort.
- Focused on accurate month-end process forecasting and reporting while collaborating with divisional c-level executives on EBITA savings during offshoring project.
- Acted as an early adopter, subject matter expert (SME), and multi-department training coach for the latest financial applications and tools.

Aon Hewitt LLC, Lincolnshire, IL (*formerly Hewitt Associates*)

Financial Analyst – Client Services, HR Business Process Outsourcing | Financial Analyst – IT Services | Accounting Analyst – Corporate Controllershship | 2008-2011

Provided valuable guidance to c-level executive leadership regarding staffing, operating budgets, and capital costs while progressing through a series of analyst roles. Administered and ensured compliance with SEC reporting mandates.

Accomplishments

- Audited financials and saved \$1.3M+; discovered a \$1M redundant accrual for maintenance service; identified and recovered a \$200K uncollected rebate; detected a \$100K dual payment for contract renewal.
- Maintained \$77M cash and payroll accounts, \$305M securities and investments; \$80M intangibles and goodwill.
- Served as Finance Lead on Strategic Review Board for IT contracts over \$1M.

DePaul University, Chicago, IL

Interim Operations Manager | Accounting Associate | 2006 – 2008

Prepared monthly financial statements and reported to budget manager and department dean when charged with administering financial reports and records for 12 operating budgets valued up to \$2M. Trained and supervised a staff of as many as 20 indirect reports in best practices and procedures.

Accomplishments

- Held accountability for processing \$1.6M in scholarships.
- Produced financial reporting for university events with budgets up to \$200K.

EDUCATION ▪ PROFESSIONAL ASSOCIATIONS ▪ TECHNICAL TOOLS & SKILLS

Bachelor of Science in Commerce (BSC) – Finance & Accounting, Summa Cum Laude | DEPAUL UNIVERSITY, Chicago IL

Association for Financial Professionals (AFP)

The Association of Accountants and Financial Professionals in Business (IMA)

Power Excel user - macros, pivot tables/Power pivot, financial modeling • PowerBI • Tableau • Advanced PowerPoint Access • Word • SQL • PeopleSoft • SAP • Essbase • TM1 Platform • GEAC Financial Reporting & Budgeting Platform