

**SUMMARY**

Results-oriented finance professional with **10+ years of experience** in financial modeling and analysis including 3 statement financial modeling, leading budgeting cycle and monthly/quarterly reporting, and business partnering with various stakeholders. Extremely proficient in financial planning and reporting systems, with **strong technical database** skillset including managing ETLs, data transformations, and maintaining data integration channels using **SQL** to execute queries within **Vena, NetSuite, Oracle Hyperion, IBM Cognos, and SPSS**. Skilled in developing reporting templates and maintaining data hierarchies and system workflows. Seeking roles to leverage expertise in financial modeling, forecasting, and budgetary analysis. Experience with **using datasets to create visualizations** to track KPIs, generate waterfall charts, etc.

**PROFESSIONAL SKILLS**

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- Financial Modeling and Forecasting
- Annual Budgeting and Planning
- Monthly/Quarterly Reporting and Variance Analysis
- Automation and Process Improvement
- Financial Planning System Implementation
- Financial Statement Analysis
- Capex Budgeting
- Corporate Development

**EDUCATION**

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**B.S. Business Administration** | University of California, Berkeley – Haas School of Business

**Minor in Asian American and Asian Diaspora Studies** | UC Berkeley - College of Arts and Science

**TECHNICAL SKILLS**

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SQL, PowerQuery, MS Excel (Expert: Pivot Tables, Index- Match, VLOOKUP, Sum Ifs, Nested formulas), Vena, NetSuite, Oracle Hyperion, IBM Cognos, SPSS, Qualtrics, GoogleSheets, MS PowerPoint (Expert), MS SharePoint, MS Project, SurveyMonkey, PowerBI, VBA (intermediate)

**PROFESSIONAL SKILLS DEMONSTRATED**

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**Various clients in different industries****Finance Consultant – Financial Planning and Analysis (FP&A) Manager**

Nov 2022 – Present

**Annual Budgeting:** Developed and fully responsible for annual budget planning process (zero based budgeting) for a Biotechnology B2C mobile application client, partnering with various different departments to create a full P&L including revenue, cost of revenue, and operating expenses

**Board Reporting and Analysis:** Support Investor Relations with external reporting and analysis, provide data and analysis to for the Board of Directors meeting and assist in SEC reporting and filing

**Quarterly Forecasting:** Conduct quarterly and monthly financial reporting, including but not limited to actual vs. budget vs. forecast summaries for all departments and organizations, tracking of revenue, gross margin, operating expenses, and headcount reporting

**ERP/EPM/Financial Planning Systems:** Solely responsible for building and maintaining all reporting for finance in Vena financial planning system. Instituted best practices to streamline and automate to support new analysis and initiatives. Maintain systems integration, data infrastructure and governance, internal controls, process improvement as it relates to an ERP system

**SEASHINE FINANCIAL - Real Estate Startup****Financial Planning and Analysis (FP&A) Manager (Managed 2 direct reports)**

Mar 2022 – Nov 2022

**Cross-functional Initiatives:** Coordinate with department leaders to develop tools to automate and improve business processes, analysis, and reporting including the automation of journal entries, market value of properties, and financial statements

**Financial Modeling:** Work with executives in the development and maintenance of forecasting tools, stakeholder reports, financial models, and business process models such as lease payments and property originations forecast

## **VERB TECHNOLOGY - Software as a Service (SaaS Startup)**

### **Senior Financial Analyst (Direct report to CFO)**

2021 – Mar 2022

**Go-To -Market (GTM) Analysis:** Work with Sales and Marketing teams to forecast CAC, LTV, Churn to get revenue metrics like MRR and ARR

**Budget Planning:** Work with the executive team to collate and execute the annual budgeting and quarterly forecast processes, modeling various scenarios and any additional ad hoc analysis to drive informed decision making

**Financial Modeling:** Manage the financial model including profit & loss, balance sheet, and cash flow on a regular basis

**Corporate Development:** Create ad-hoc models for corporate development and M&A opportunities

## **HIGHER GROUND EDUCATION - Education Technology Startup**

### **Financial Planning Analyst (Direct report to CFO)**

2019 - 2021

• **Financial Modeling and Forecasting:** Maintaining and updating the financial statement model including but not limited to: addition of pro formas related to new school openings, monthly actuals, forecasting of all line items and accounts across all 3 financial statements, and account reconciliations

• **Financial planning system implementation:** Lead the implementation of a new cloud-based financial planning platform called Vena, retrieving data using SQL, designing reports, and maintaining a database system

• **Dashboard Reports and Variance Analysis:** Creating reports/trackers with key metrics and variance analyses for relevant stakeholders, including executives and investors (EB-5, real estate partners, venture capital)

• **Capex Budgeting:** Work closely with the real estate development team to maintain budgets related to capital expenditures in the form of tenant improvement enhancements and general construction of school facilities

## **DEL TACO**

### **Senior Financial Analyst**

2017 – 2019

• **New Product Development Research:** Manage the end-to-end research process for new menu products through concepts, taste, and market tests, determining consumer acceptance and overall appeal using behavioral metrics

• **Research Design, Analysis, and Report Development:** Collaborating cross-functionally with internal stakeholders to translate business objectives into research design by creating survey questionnaires and reports that will lead to actionable insights, allowing senior leaders to drive business decisions

• **Segmentation Analysis and Key Metrics:** Analyze sales trend by markets, price tiers, demographics, and order modes to understand core drivers of the business, allowing marketing leadership to execute strategies accordingly

## **EL POLLO LOCO**

2016 – 2017

### **Marketing Finance Analyst**

• **Topline Sales Trend Reporting and Analysis:** Analyze topline sales trend by markets, price tiers, demographics, and order modes to understand core drivers of the business, allowing marketing leadership to execute strategies accordingly

• **Financial Budgeting:** Manage company's \$40 million marketing budget, keeping management up-to-date on sales and spending deviations of different media/ad channels

## **UC BERKELEY, LIBRARY BUSINESS SERVICES**

2015 – 2016

### **Financial Analyst**

• **General Ledger Reconciliation and Key Financial Controls:** Perform key financial controls by auditing and reconciling ledger summary reports from BAIRS in accordance with SAS115 federal regulatory policies.

## **ERNST & YOUNG (CONSULTING PRACTICE)**

2013 – 2015

### **Consultant**

• **Budgeting and Forecasting:** Drove the re-design of an outdated Budgeted vs. Actuals (BvA) forecasting model, with 2 senior team members, streamlining cashflow forecasts

## **OTHER RELEVANT INFORMATION**

**Technical Skills:** SQL, PowerQuery, MS Excel (Expert: Pivot Tables, Index- Match, VLOOKUP, Sum Ifs, Nested formulas), Vena, NetSuite, Oracle Hyperion, IBM Cognos, SPSS, Qualtrics, GoogleSheets, MS PowerPoint (Expert), MS SharePoint, MS Project, SurveyMonkey, PowerBI, VBA (intermediate)