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## HIGHLIGHTS OF QUALIFICATIONS

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- Extensive knowledge of financial/accounting principles
- 5+ years of progressive experience in finance
- Highly skilled at analyzing financial statements
- Strong analytical and problem solving skills
- Advanced financial modeling skills
- People-oriented, enjoy working independently and as a team player
- Ability to bring timely closure to issues and projects
- Highly motivated to succeed, welcome professional challenges
- Ability to envision the "big picture" while focusing on multiple objectives or assignments

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## PROFESSIONAL EXPERIENCE

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### ***Fidelity Investments - Financial Analyst***

Boston, MA 2008-Present

- Coordinated and managed the annual business planning, budget and ongoing forecasting process with senior management
- Analyzed financial results to understand key business drivers and variances to budget/forecast as part of monthly management reporting
- Managed process to identify, establish, and maintain appropriate performance measurement practices, including performance reporting and scorecard
- Worked closely with Corporate Accounting to ensure proper recording of specific transactions
- Drove process improvements that resulted in a more efficient organization
- Created and maintained efficient, automated processes for tracking business metrics

### ***liveSTORYBOARD Inc. - Financial Consultant***

San Francisco, CA 2004-2007

- Analyzed and evaluated income statements, balance sheets and cash flow statements
- Responsibilities increased from bookkeeping to budgeting, forecasting and cash flow management
- Developed trend reports in order to analyze balance sheets and income statements key ratios
- Developed presentations for various clients meetings as well as monthly presentations for the management on performance on key metrics
- Compiled periodic financial reports for the managerial team
- Conducted in-depth research, compiled presentations and made recommendations to management about competitive landscape
- Created and manipulated complex and accurate financial models with solid assumptions in Excel
- Used various techniques to translate research and modeling findings into clear visuals and concise reports

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## EDUCATION

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### **Golden Gate University**

*Master of Science: Corporate Finance*

San Francisco, CA  
December 2007

### **San Francisco State University**

*Bachelor of Science: International Business*

San Francisco, CA  
December 2005

### **Banker School**

*Diploma in Insurance and Banking*

Sofia, Bulgaria  
Spring 1998

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## SOFTWARE SKILLS

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Excellent command of business software packages: MS Office, Oracle Hyperion Planning, Oracle Essbase, Oracle Discoverer, Oracle Hyperion Performance Suite 8 and Emptoris Spend Analyzer.

***References available upon request***