**Controller**

Financial management professional with experience **in providing financial support to Operations and Technology groups.** Driving force behind automation, standardization, and documentation of financial reporting to ensure efficient generation and streamlined presentation. **Contributes to organizational success by surpassing financial metrics, as well as business goals and objectives.** Proactively identifies opportunities to improve efficiency across core finance processes while maintaining cross-functional relationships with key business partners.

Core Competencies

|  |  |  |
| --- | --- | --- |
| * *Financial Reporting & Analysis* | * *KPI Definition* | * *Internal Controls* |
| * *Financial Modeling* | * *MS Office | SAP | Essbase* | * *Operational Audit* |
| * *Budget Management* | * *Business Process Improvement* | * *Expense Forecasting* |

professional experience

**JPMorgan Chase** – Columbus, OH 2007-Present

*Financial institution with assets of $2.6 trillion, presence in over 100 markets, and over 250,000 employees.*

**CCB Technology Finance & Business Management**

**Vice President, Digital Technology** (2017-Present)

*Provide business management support for technology groups with an annual budget of $524M and 3,000+ resources*.

Currently a member of centralized team that is responsible for the strategic planning and reporting needs for Digital. Responsibilities include headcount tracking, month-end close, annual budget planning, and organization architecture.

* **Improved** headcount tracking by developing a process that allows each team member to maintain individual files and update headcount and related expense forecast, as well as, a consolidation process to provide holistic resource reporting. **Developed** an expense forecast model to show the financial impacts of staffing plans.
* **Provide various KPI reporting to be presented to technology leaders.**
* **Partner** with Offshore team in completion of month-end estimate, variance commentary and presenting results to upper management.

Previously supported multiple technology groups and partnered with senior leadership from each group in determining staffing needs in order to support delivery of projects and meet budget targets. Worked with program owners to review compliance levels of project forecasting.

* **Improved FTE ratios from 56% to 80% between 2017 and 2019** by partnering with technology groups to identify tenured resources and monitoring replacement strategy of assigned groups.
* **Focused** on establishing productive, professional relationships with Senior Management of assigned technology groups.
* **Collaborated** with various groups throughout the organization in order to meet objectives.
* **Managed** junior analyst and served as **team lead** in ensuring team deliverables are met. Created Rules of the Road reference for training new team members.
* **Recognized for “Exceeding Expectations” and “Doing the Right Thing”** from peers in the organization via Corporate Recognition program.

**Senior Associate, Home Lending Technology** (2012-2017)

*Managed inter-company technology expenses for Home Lending Technology group with $500M annual budget.*

Completed monthly variance analysis of inter-company technology costs. Partnered with expense leads to gain understanding of incoming expenses and variances to planned expense levels. Consolidated and reviewed volumes to ensure loading at expected levels. Partnered with infrastructure team to review volumes based on upcoming projects.

* **Developed reporting processes for incoming and outgoing inter-company expenses that allowed for improved analysis of expenses and $40 million expense reduction in 2015**.
* **Streamlined process** to ensure expenses were mapped to specific applications and billed out based upon application use.
* **Coordinated annual planning of user-based expenses** for all business groups in Home Lending. Developed budget models for use by business groups in planning user-based expenses.
* **Recognized for partnership with efficiency team and owning issues start to finish** via Corporate Recognition Program.

**Global Technology Finance & Business Management**

**Senior Associate** (2007-2012)

*Provided global financial support to Global Technology groups with annual budget of $230 million and 287 resources.*

Worked with assigned groups in tracking expenses and headcount updates to keep expense forecasts current. Provided financial results each month and reviewed with senior leadership. Partnered with Accounting team to ensure accurate monthly expense accrual.

* Focused on development of automated files to assist with updating monthly expense, headcount forecast, and annual budget. **Reduced time preparing load files and increased accuracy of expense forecasts, with monthly expense variances for assigned groups consistently within the +/- 3% of forecast**.
* **Led** summer interns on various projects

**NSG-Pilkington, Automotive Glass Replacement Division** – Columbus, OH 2001-2007

*North American supplier of laminated and toughened glass for automotive glass replacement market. Over 100 company-owned wholesale service centers nationwide.*

**Senior Financial Analyst**

Provided financial and operational support for **100+ wholesale service centers nationwide**. Completed month-end close process and prepared monthly reporting package for entire division (GAAP and IFRS).

* + - Co-ordinated the annual budgeting process for the Wholesale sector utilizing **historical data for location-specific budget creation (historical sales, sales projections, and inventory levels).** Prepared consolidated reporting for presentation to senior management for review and approval following finalization of location budgets by location managers.
    - Partnered with Corporate Audit group to identify areas requiring immediate attention as highlighted by service center failed corporate audit scores. **Developed abbreviated “pre-audit” for locations scheduled for audits**. Visited service centers, fostering positive relationships with service center teams. **Improved average audit scores 25%** by reviewing results with location management and developing action plans to address areas requiring improvement.

Education

**Master of Business Administration (M.B.A.) -** Franklin University – Columbus, OH

**Bachelor of Arts (B.A.), Business Administration/Finance -** Otterbein University – Westerville, OH