

Dynamic FP&A Leader excels in corporate financial planning & analysis, leveraging strategic insights, robust forecasting models, and effective team leadership to drive informed decision-making and optimize financial performance.

Detail-oriented FP&A Leader with extensive experience in leading corporate financial strategies and operations. Excel in enhancing forecasting and budgeting efficiency, demonstrated by the streamlined maintenance of key forecast/budget applications. Proven track record of implementing financial systems that substantially improve process accuracy and aid in strategic board-level decision-making. Skilled in fostering cross-functional collaboration to articulate narrative behind financial trends and data. Committed to developing and managing high-performing finance teams, optimizing reporting processes, and driving informed business decisions.

Areas of Expertise

- Financial Planning & Analysis (FP&A)
- Process Improvement & Change Management
- Board-Level Communication & Reporting
- Financial Reporting & Variance Analysis
- Cost Accounting & Management
- Strategic Financial Planning
- Financial Systems Implementation
- Performance Metrics
- Budgeting & Forecasting
- Financial Modeling
- Revenue Optimization
- Risk Management

Professional Experience

TransUnion, Chicago, IL

August 2023 — Present

Director of FP&A - Corporate Financial Planning & Analysis

Orchestrate enterprise-wide monthly forecasting, annual budgeting, and capital expenditure planning, managing an annual revenue of \$3.8B, EBITDA of \$1.5B, and capital expenditures of \$300M. Generate incisive monthly financial reports for executive leadership, offering detailed variance analyses and insights. Craft quarterly management reporting presentations for Board of Directors, highlighting financial outcomes and projections.

- Led and developed high-performing team of one FP&A Manager and three Financial Analysts to enhance corporate financial strategies and operations.
- Served as product-owner for OneStream budget/forecast application, collaborating with business units and IT to integrate business changes, including M&A and reorganizations within the financial system
- Enhanced efficiency in managing forecast/budget application (OneStream), resulting in smoother operational processes and improved accuracy.
- Collaborated with Investor Relations to produce quarterly business segment financial reporting for Earnings Releases.

Federal Reserve Bank of Chicago, Chicago, IL

July 2018 — August 2023

Financial Planning & Analysis Manager - Financial Management (Nov 2020 - Aug 2023)

Directed strategy, objectives, and operations for Financial Management team, ensuring alignment with organizational goals. Coached and developed team of 11, overseeing Cost Accounting, monthly Forecasting, Annual Budget Planning, and managerial reporting. Fostered robust relationships with senior leadership, providing insightful financial guidance during strategic planning and decision-making processes. Led successful ERP and Budget/Forecast application implementations (Workday/Adaptive Insights), driving change management and staff training to optimize financial systems and processes. Ensured adherence to Board requirements through meticulous development of Cost Accounting controls, contributing to flawless audit results.

- Managed comprehensive monthly forecasting and annual budgeting, projecting enterprise-wide expenses of \$500M and capital forecasts of \$30M.
- Pioneered and presented management reporting to executive leadership and Board of Directors, translating complex financial data into actionable insights.
- Orchestrated framework with internal Executive Leadership Team (ELT) to evaluate and act on investment opportunities, aligning with strategic objectives.
- Acted as financial business partner to Human Resources, enhancing internal Position Management (FTE) processes.
- Created comprehensive monthly headcount and position reporting tools, streamlining organizational resource management.

Financial Planning & Analysis Team Lead (Jul 2018 - Nov 2020)

Streamlined monthly forecasting and annual budgeting processes, ensuring meticulous review and adjustment in response to business changes and strategic investments. Conducted detailed financial reporting and analysis, delivering insightful monthly briefings to senior management. Led training sessions on budget management and financial reporting systems.

- Spearheaded financial operations and guided team of 5 analysts to enhance forecasting accuracy and budget adherence for an organization with annual departmental expenses of \$500M and capital forecasts of \$30M.
- Formulated and implemented comprehensive headcount tracking system, optimizing resource allocation in organization where personnel costs constitute 70% of expenses.
- Partnered effectively with stakeholders, ensuring alignment of financial strategies with business objectives.
- Facilitated comprehensive training programs, elevating organizational understanding of financial policies and tools.

SAC Wireless, A Nokia Company, Chicago, IL

January 2018 — July 2018

Sr. Financial Analyst - Business Operations

Orchestrated comprehensive month-end reporting and variance analysis, identifying key factors influencing financial outcomes such as volume shifts, service line/customer mix adjustments, and rate fluctuations. Partnered with business owners to project full-year financial forecasts, anticipating revenue and expenditure shifts.

- Provided strategic support to operational teams through detailed pricing, cost-saving identification, and margin analysis to drive business decisions and financial health.
- Collaborated closely with business leadership to elucidate narrative behind financial data and trends.

The Northern Trust Company, Chicago, IL

November 2015 — January 2018

Sr. Financial Analyst, 2nd Vice President

Managed comprehensive financial reporting and data analysis to guide management decisions within Enterprise Enablement Business Unit Finance. Streamlined month-end close activities, including expense analysis, journal entry processing, and variance and trend explanations, enhancing forecast accuracy. Collaborated with business unit managers to refine monthly forecasts and sculpt the annual budget, utilizing advanced financial systems such as Oracle Peoplesoft, Hyperion (HFM), Cognos TM1, and Cognos Workspace Advanced. Drove process improvements in forecasting, planning, and management reporting, significantly increasing operational efficiency. Partnered with finance and operations management to provide strategic recommendations based on financial performance insights.

- Identified and implemented efficiency improvements in forecasting and planning processes, reducing time spent on management reporting.
- Played a pivotal role in developing and updating financial forecasts and the annual budget, ensuring alignment with strategic objectives.
- Served as Financial Business Partner supporting the high-priority initiative focused on determining the most cost-efficient allocation of resources across various worldwide offices

Additional Experience

- **Electro-Motive Diesel (Now Progress Rail, A Caterpillar Company), LaGrange, IL**
 - Supervisor, Financial Planning & Analysis
 - Sr. Financial Analyst, Financial Planning & Analysis
 - Cost Analyst, Management Accounting
 - Accounts Payable Team Lead, Vendor Relations/Problem Resolution

Education

Master of Business Administration, Finance Concentration (GPA 4.00/4.00), Strayer University, Chicago, IL

Bachelor of Science in Finance, Economics Minor, Cum Laude (GPA 3.77/4.00), Illinois State University, Normal, IL