

First Name Last Name

Address
City, State, Zip Code
Phone | Email

FINANCE & MANAGEMENT PROFESSIONAL
Budget Management | Consulting | Legal & Compliance | Revenue | Sales

Highly analytical professional with excellence in increasing efficiency, streamlining processes, improving reporting and managing bottom-line growth for midsize to large-size organizations with multimillion to billion-dollar investment portfolios. Familiarity spans multiple industries and sectors, across domestic and international markets. Brings a unique combination of **legal & administrative** leadership backed by **marketing, retail, healthcare,** and technological expertise. Coordinates effectively with cross-functional teams and thrives in fast-paced, results-focused environments where change is constant. Additionally interested in Private Equity, **x**, and **x**. **Core competencies include:**

- Training & Development
- Supervising Personnel
- Compliance & Regulations
- Legal Correspondence
- Bloomberg Essentials Certified
- Excel Visual Basic (VBA)
- SQL Writing Experience
- Microsoft Office Suite (Word, Excel, PPT)
- Financial Analysis / Consulting
- Research / Forecasting
- Budget & Project Management
- Process design / re-engineering

LEADERSHIP QUALIFICATIONS

Multinational Consultant – internationally recognized in countries such as **x, x, x and x** using meticulous business management and development skills to help institutions, non-profits, and government agencies through workforce challenges, multicultural literacy barriers, productivity halts, regulation management; while offering critical recommendations.

Articulate Communicator - multilingual in English (Written & Verbal), French (Conversational) and advanced in Southern African languages such as **x, x, and x**. Skilled in delivering insightful presentations with the ability to development cross-cultural relationships with business partners, political constituencies, and government officials under pressure.

Rapport Builder – extensive practice in managing customer relationships, establishing organizational rapport with highly confidential information using personal values such as trust, morals and ethics to gain the trust of all parties to complete crucial tasks always delivered in timely manner.

PROFESSIONAL EXPERIENCE

Confidential, Cape Town, South Africa

January 2017 to Current

Manufacturing business with a conscience focused on producing quality garments that are environmentally friendly. Level 1 BBBEE accredited, 135% contributor with a reach of #. <http://ecogift.co.za/>

Title

Serving as a consultant in the garment manufacturing sector primarily focused on the management of working capital, cost accounting, marketing through social media, email and telephone (cold-calling). Increased factory output by 30% as well as became a contract manufacturer for BidVest, Performance Brands (athletic wear) and Spree in addition to increase their business with existing customers.

Confidential, City, MA

November 2014 to January 2017

Title

Reported to the Global Chief Legal Counsel and Global Chief Compliance Officer and worked with their global teams

- Assisted in preparation of periodic and annual compliance program reports to satisfy regulators, clients (including Board of Trustees) and internal managers.
- Managed preparation of the quarterly Board meetings for Mercer Funds and the Mercer Trust Company
- Assist the CCO in scheduling the quarterly calls to review the compliance questionnaire
- Manage travel arrangements: prepare itinerary/trip file - keep other staff posted as necessary; coordinate materials/supplies; coordinate hotels, meetings and meals; complete expense reports

Key deliverables:

- Prepared and processed Quarterly Board books and ensured accuracy of all information before it was sent to the clients
- Liaised with management and client to ensure all requests or issues are dealt with in a professional and timely manner
- Handled administrative aspects of charitable giving fund
- Developed and maintained training manuals and procedural documents per the requirement of SEC (Securities and Exchange Commission)
- Performed a variety of reporting tasks utilizing Microsoft Excel with VBA and Crystal reporting skills pulling data from Mercer's proprietary database

Confidential; City, MA

April 2012 to March 2013

Title

Recruited to support a small office of eighty people to create and maintain specialized reports, records and files. Assisted the Events management team in securing and planning off-site events around the country. Provided heavy schedule and calendar management for the executive team by and arranging both domestic and international travel. Company was sold.

Confidential; City, MA

October 2010 to April 2012

Title

Provided a full range of support services for five partners within the Asset Management area. Improved efficiency by enabling the team to become more productive by handling by screening incoming emails, preparing draft responses and ordering gifts. In addition, worked directly with managers on weekly postings and master reports to facilitate with oversight for all aspects of composition, editing, and preparation of final copy from draft to distribution.

- Utilized databases and propriety accounting programs to organize and maintain client engagement records
- Developed presentations for meetings and special events.
- Enrolled and tracked CPE credits, licenses and requirements
- Interact and collaborate with Lines of Service and Internal Firm Service clients
- Prepare expenses in an accurate and timely manner
- Consistently apply business acumen and specialized technical knowledge, including a comprehensive understanding of their customers' support needs and the technology used by the team
- Proactively participate in knowledge sharing activities, continuously develop and communicates best practices within formal and informal networks

Confidential; City, MA

March 2005 to October 2010

Title

Facilitated the Risk Adjustment data audit request by the Department of Health & human Services Centers for Medicare & Medicaid Services by conducting data collection via internal database warehouse. Created timeline and process for implementation and coordinated multiple team process for investigating and extracting required medical records. Maintained the collection of all medical records and prepared them for submission to the Federal government. In addition to maintaining departmental files, records, coordinating departmental events and calendar management for the Director.

Confidential; City, MA

August 1999 to March 2005

Title

Account Management of conference and meeting clients. Handled customer inquiries and lead requests for groups (e.g., local catering, hotel rooms and other services). Worked with customers to align customer their preferences with brand needs and actively up-sold each business opportunity to maximize revenues and drive customer loyalty.

- Verifies that business is turned over properly and in a timely fashion for quality service delivery.
- Managed the banquet staff and service to provide quality guest service
- Performed daily review and analysis of inventory and rates in the market to assist in the development of occupancy and revenue forecast
- Daily, weekly, and monthly reporting as assigned

INTERESTS & VOLUNTEERING

World Cup Boston 2010 – Volunteered for 18-months of exciting programming launched in September of 2009, WCB 2010. Accomplished more than 20 events that helped Bostonians forge new relationships across neighborhoods through a celebration of soccer, culture, and diversity.

Horace Mann School for the Deaf and Hard of Hearing Playground – As part of the Boston Divaz Motorcycle Club raised funds \$ and partnered with over # vendors to build the playground used by over # kids.

EDUCATION & CREDENTIALS

Bachelor of Science, Finance & Accounting Management, Northeastern University, Boston, MA | December 2017

Professional Development: x, x, x,

Conferences / Memberships: x, x, x