# Overview

**Objective:** Experienced finance professional seeking to transition back into a finance and healthcare-focused role, leveraging a strong background in regulatory audits, financial reporting, and process improvement. After gaining additional experience in talent management, I am eager to return to my core expertise to help organizations achieve compliance, operational efficiency, and strategic financial objectives.

**I have moved to the Fort Lauderdale / Miami area.**

## Texas Christian University

Bachelor of Science Degree in Economics with a Business Minor

# Work Experience

## Manager at Robert Half in Salt Lake City, UT April 2023 – Present

* Managed over 30 employees recruited into the Full-Time Engagement Professionals Program, providing guidance on career growth, pay, bonus opportunities, engagement, and benefits.
* Managed two lines of business, Full-Time Engagement Professionals and Contract/Contract-to-Hire, overseeing recruiting and marketing efforts.
* Monitored performance and tracked compliance trends, utilizing tools like Salesforce to ensure adherence to organizational policies and objectives.
* Collaborated with leadership and cross-functional teams to align processes, recommend improvements, and implement effective solutions.
* Developed and led training programs to onboard team members, ensuring proficiency in workflows and tools while promoting continuous quality improvement.
* Created and revised standard operating procedures (SOPs) to ensure alignment with organizational goals and operational consistency.
* Tracked and analyzed costs and metrics, such as benched employee costs, bonus eligibility, and economic indicators, to align department goals with strategic outcomes.

## Senior Financial Analyst at Quality Systems Consulting Services - Remote Dec 2021 – April 2023

* Prepared monthly financial statements (Balance Sheet, P&L, and Cash Flow Statement) ensuring compliance with industry-specific regulatory standards.
* Analyzed intercompany transactions and completed monthly reconciliations to support audit readiness and adherence to regulatory reporting requirements.
* Managed billing processes for consultants servicing clients in the medical device industry, ensuring accuracy and regulatory compliance.
* Processed payroll weekly for over 30 consultants, maintaining strict confidentiality and compliance with industry labor laws and standards.
* Consolidated monthly reports and provided actionable insights to support decision-making aligned with medical device quality and regulatory objectives.
* Automated reporting processes to enhance accuracy and align with industry regulatory requirements, reducing errors in financial operations.
* Designed and maintained dashboards to track key performance metrics, emphasizing compliance, quality assurance, and regulatory performance indicators.

## Senior Financial Analyst at Varex Imaging in Salt Lake City, UT May 2021 – July 2022

* Drafted and maintained accurate financial reports, including budgets, accruals, and capital expenditure tracking, ensuring compliance with organizational policies and procedures.
* Provided detailed budget vs. actuals analyses, identifying variances and presenting findings to VPs, CFO, and CEO to inform strategic decision-making.
* Trained 30+ project managers on budget management, expense tracking, and process compliance, enhancing organizational adherence to financial controls.
* Identified and resolved discrepancies in SG&A cost center accruals, partnering with AP to ensure accurate allocation and regulatory compliance.
* Improved cross-functional communication by developing additional reporting and training resources for capital project managers, ensuring clarity and accountability.
* Prepared monthly financial summaries and incentive compensation reports for leadership, delivering clear and concise updates aligned with performance metrics.
* Spearheaded meetings with AP to audit and validate expenses, ensuring proper accruals and adherence to fiscal policies throughout the year.
* Developed and presented reports to the Capital Committee on project expenditures, identifying over-budget projects and recommending corrective actions.
* Implemented process improvements to enhance data accuracy, compliance, and efficiency in financial reporting and project tracking systems.

## Associate at Goldman Sachs in Salt Lake City, UT March 2020 – May 2021

* Managed mutual funds annual and semiannual financial reporting process with external auditors, legal counsel and funds' accounting agents
* Established all accounting policies and perform financial statement analysis (including knowledge of US GAAP) for annual and semiannual reporting periods
* Established and monitored financial control framework, both internally, and that of the funds' external accounting agents.
* Managed and analyze mutual funds budgets and forecasts on a monthly basis
* Automated the accounts payable process for mutual funds utilizing FTP and introducing new controls to make AP process more efficient and controlled
* Partnered with several teams to provide monthly, quarterly and annual reports
* Investigated mutual funds’ expense ratios and portfolio turnover to present to Managing Director monthly

## Senior Financial Analyst at Molina Healthcare in Irving, TX May 2018 – March 2020

* Prepared financial reports and developed budgets and forecasts for 2018 and 2019
* Prepared accurate, timely and insightful monthly variance reporting for state financials
* Performed analytical modeling to evaluate new business models and support key strategic decisions
* Managed $40M worth of Profit Improvement Projects (PIP’s) for 2018, and $70M for 2019
* Scoped, tracked, and managed multiple projects to be Profit Improvement Projects (PIP’s), which included creating over 30 new PIP’s for 2019 for Texas, New Mexico and Mississippi
* Analyzed trends in Texas, New Mexico and Mississippi for the 1,3,6 and 12 month trends on a monthly basis
* Maintained and explain the weekly fluctuations in the authorizations for Texas and New Mexico
* Performed in depth analysis into LOB’s, SDA’s and facilities to see why trends were significantly up or down each month
* Managed network settlements and worked with partnering departments to provide proof of settlement request from hospitals
* Created ROI’s for multiple departments to analyze the return on investment for increasing headcount
* Held meetings with VP’s, CMO’s and Plan Presidents to review PIP’s financial progress throughout 2018 and 2019
* Prepared monthly, quarterly and annual financial reporting related to Texas Department of Insurance reporting
* Collaborated and assisted the Plan President with the 2019 Strategy Leadership Meeting for Healthcare Services, Provider Contracting, Quality and Government Contracts & Compliance
* Created SQL to code to pull data reports, analyze and produce a final product for Directors, VP’s and CMO’s
* Took on several initiatives to reduce costs for the Texas, New Mexico and Mississippi Health Plans

## Financial Analyst at American Tower in Boston, MA May 2017 – May 2018

## Financial Analyst at Textron in Fort Worth, TX May 2016 – May 2017

# Technology & Systems Experience

•Oracle-OBIEE •Microsoft Office Suites •Salesforce.com •Calendly •SQL •Power BI •SharePoint •Siterra •POLARIS •SAP

•Workday •Hyland •Serena •SPSS •Tangoe •Qlikview •Lawson & Lawson Add-In •Report Services •Blackline •Cforia

•Concur •Citibank Commercial •Essbase •JDE •Microsoft SQL Server Management •Adobe Reader/Editor

•OPAL •ArchPro