Key Achievements

- Completed over 2,000 deliverables for financial advisor offices in 4 years ranging in size from \$50M to \$25B in assets under management.
- Developed a 5-year income statement forecast for a CIM, which encompassed 10 subsidiaries, 5 product lines, and projected \$90M in EBITDA.
- Revamped the global sales organization's commission process, leading to a 50% improvement in calculation time and strengthening the relationship between Finance, Sales, and HR.
- Developed a global payroll budget for over 400 employees in multiple currencies.

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Technology Proficiency

- Microsoft Excel
 Microsoft Dynamic NAV
- SAP Fathom

Education

- · California Lutheran University, MBA, Finance
- · University of California Santa Barbara, BA, Business Economics

Previous Employers

- LPL Financial
- Hygiena
- Haas Automation

