

SUMMARY

Detailed-oriented and critical thinking FP&A professional with outstanding academic credentials, coupled with complimentary skills in process improvement and redesign, business controls and transformation, project management, and advanced modeling capabilities. Strong team player, highly recognized for collaborating to achieve business results. Core competencies include:

- P&L Management and Reporting
- Expense Control
- Internal Business Controls
- Process Redesign and Improvement
- Planning, Forecasting and Variance Analysis
- IT Process Consulting and Transformation
- Hyperion Essbase, PeopleSoft and NetSuite
- Project Management

PROFESSIONAL EXPERIENCE

REFUAH HEALTH CENTER, Rockland County, NY **2015 to present**
Director, Financial Planning & Analysis **July to present**
Finance Consultant **March - July**

Retained by President/CEO of Refuah Health Center to lead and execute on various special projects.

- Perform analysis on operational activities including historical, current, and projected revenue and expense, variances and key financial data including claim payments and overhead costs and review results and variances with the President/CEO and Board Treasurer.
- Provide CEO with expert opinion and financial analysis of key organizational issues.
- Partner with leadership teams in various departments to drive process improvement.
- Respond to ad hoc requests for analysis as needed by CEO and Board Treasurer.

VOLUNTEER CFO for a Not-for-Profit Organization **2011 to present**

MEDIDATA SOLUTIONS INC, New York, NY **2012 to 2013**
Manager, Financial Planning and Analysis

Developed and tracked company-wide P&L financial targets; analyzed actual versus budget results, highlighting issues/opportunities to senior management.

- Lead company-wide budgeting and forecasting consolidation activities in coordination with VP of FP&A and CFO. Also, lead the budgeting and forecasting activities for assigned departments
- Analyzed company-wide financial and operational results against forecast, and present results regularly to the Executive team.
- Developed and tracked company-wide P&L against target, while providing financial support to business unit leaders
- Managed day to day financial responsibilities for Marketing, Sales and G&A departments.
- Prepared financial presentations and ad-hoc financial analysis as needed for the Executive team.

TIME INC., Stamford, CT **2011 to 2012**
Manager, QSP Financial Planning and Analysis

Managed the planning, budgeting and analysis of Time Inc.'s fundraising business (QSP Inc.). Managed \$100M+ in US Magazine, Gift and Book sales.

- Developed accurate Annual Budgets and Quarterly Reforecasts for QSP's US Magazine, Gift and Book businesses.
- Analyzed P&L statements on a monthly basis including variance to reforecasts, budgets and prior year analyses to align to all business requirements.
- Prepared, distributed and presented several business financials to the CFO and numerous Product Category Owners.

INTERNATIONAL BUSINESS MACHINES (IBM), New York, NY**1999 – 2010****Senior Financial & Business Operations Analyst****2007 – 2010**

Provided planning, budgeting and measurement support to the Vice President of Security and Asset Management unit within the Global Technology Services group. Managed \$100M+ in costs. Reduced costs significantly over a three year period by performing multiple in-depth analyses of the cost drivers and suggesting strategies for implementation.

- Managed quarterly close and forecast processes within assigned portfolio and created bridges for year-to-year and quarter-to-quarter versus outlook.
- Led the annual planning process by partnering with the business lines and finance organizations to create a cohesive and cogent business financial plan.
- Coordinated the \$5M+ IT spending process for the communication and distribution sectors. Implemented new controls and procedures which improved the existing approval process, leading to less time for senior management to review and approve requests and a 10% reduction in expenditures.

Lead Financial Analyst**2005 – 2007**

Managed and led the \$80M+ marketing expense budget for the WebSphere software brand within the IBM Software Group.

- Provided comprehensive financial and business controls support to the WebSphere Marketing Vice President. Prepared high level financial presentations, budgeting and forecasting, variance to budget/forecast/prior year analyses and provided support during the planning process.
- Led a team of 5 financial analysts in successfully developing accurate financial and operational analysis for all marketing program expenses within the group. Senior management used these analyses in measuring the performance of marketing programs against plan budgets
- Managed negotiations with several internal partners that resulted in a \$5M reduction of marketing program expenses.

Senior Management Consultant**2000 - 2005**

Developed process reengineering solutions for leading Financial Services Corporation clients using IBM Global Services (IGS)'s systems design framework and methodologies. Increased client satisfaction and improved engagement delivery and cycle times through effective project management and FP&A. Major engagement highlights include:

- Managed a major network services project as part of a large outsourcing deal between IGS and a top financial institution. Developed the initial project office set-up by defining the IGS systems/process interfaces and integration (project financials, project definition report processes, and project processes). Assisted in implementing project management systems and processes to ensure a successful project take-off. Tracked and managed project financials on a weekly/monthly basis and presented regularly to both IGS and the client's executives.
- Contributed to several major business contracts proposal definitions that helped win IGS numerous \$100M+ deals, including a multi-year \$5B contract with one of the Firm's largest new clients.

EDUCATION AND AWARDS

MBA Finance & General Management
B.A. Economics & Statistics

Fuqua Business School, Duke University, Durham, NC
University of Ghana, Legon, Ghana

Awards: IBM Bravo Award for Excellence in Financial Reporting, 07/2008; IBM Outstanding Performance Awards, 12/2001, 12/2002, 12/2003.

ADDITIONAL INFORMATION

Competent in Microsoft Tools (Advanced Excel, PowerPoint, Word, Visio, Outlook and Project); Hyperion Essbase; PeopleSoft; Cognos Reporting and Planning; Brio Query; Workday; NetSuite; SAP; QuickBooks