

# LongandShortofit

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## PROFESSIONAL EXPERIENCE

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### Publicly Traded Co

City, Midwest

Financial Analyst

July 2014 – Present

- Analyze portfolio of life insurance policies to improve forecasting, assist in new product development and pricing, and improve terms and relations with reinsurers
  - Reinsurance
    - Prepared and distributed report containing confidential data via internal FTP site, client FTP, or physical medium according to client preferences
    - Primary point of contact to answer follow-up questions from 10 reinsurers who purchased over 40% of exposed risk
  - Experience Studies
    - Compared predicted and actual performance of life insurance policies
    - Lead analyst on 4 studies including 2 quarterly mortality memos for senior management, study of policies that converted from term to either whole or universal products, and ongoing high-profile “deep dive” project
    - Assisted with studies of lapse and surrender rates
  - Analyst Quarterly Meeting
    - Gave PowerPoint presentation on VBA macros and Excel best practices including formatting conventions and keyboard shortcuts
    - Developed Excel Add-in featuring macros which increase speed and accuracy of work
      - <Real cool thing that is obvious once you hear it>
      - Cycle through formatting styles
  - Support sales team with scenario and sensitivity analysis of life insurance policies

### Really Small Co

City, Midwest

Quality Assurance Processor

August 2013 – July 2014

- Proposed and lead multiple projects which resulted in improved workflow, more accurate deliverables, and the expansion of an engagement with major client
  - Developed automated system to organize and create database of over 25,000 mortgage lending documents which included multiple access and query methods
  - Conducted due diligence and audits of residential mortgages which were bundled into underperforming mortgage backed securities

### Small Publicly Traded Co (via Temp Agency)

City, Midwest

Accounts Payable Specialist

April 2013 – August 2013

- Responsible for daily report on all ACH and wire payments which was used to ensure a stable cash position, maximize receipt of early payment deductions, and maintain SOX compliance
- Worked with Payables and Procurement teams to verify, process, and pay invoices

## EDUCATION

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### Non-Target

City, Midwest

Bachelor of Arts in Economics; Emphasis in Applied Economic Analysis

December 2012

## SKILLS, PROJECTS & INTERESTS

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- Expert Excel, VBA; Intermediate SQL, PowerPoint; Proficient SAS, Access, Word, and Outlook
- Completed Wall Street Prep financial modeling course covering trading and transaction comps, DCF, LBO, and M&A
- Performed copy editing of final determinations for <East Coast State Legal Office> which resulted in department-wide change in standard verbiage
- Prepared PowerPoint presentation for company-sponsored youth mentorship program
- <Local Gym> Weightlifting Team, Cooking Italian and Greek food