

SENIOR FINANCIAL ANALYST

FINANCIAL PLANNING | BUDGETING AND ACCOUNTING

Award-winning **Senior Financial Analyst** with over 14 years of experience in Budgeting and Finance in a Financial Analyst role and with over 10 years of that experience working within the health care industry. Proven expertise in the following: completing financial reporting month-end close processes, improving bank reconciliations, short-term and long-term quarterly interest income distribution processes and developing and monitoring performance indicators. Possess strong ability to identify scorecard targets and formulate strategic objectives in order to exceed aggressive performance metrics and balanced scorecard. A deadline oriented professional with a thorough knowledge of GAAP, superb analytical and problem solving abilities, project management skills, high technical proficiencies and the aptitude to handle multiple projects simultaneously.

- Financial Planning & Analysis
- Project Management
- Oracle Hyperion System Administrator
- SharePoint Site Design & Maintenance
- Data Analysis
- Contract Review & Analysis
- Budget Models
- Financial Reporting
- Multi-Tasking
- Budgeting & Cost Control
- Effective Decision Making
- Acquisitions Analysis
- Budget Preparation
- Score Card Targets
- Training on Process & Systems
- System Implementation & Upgrade
- Personnel Management
- Time Management & Prioritization
- Reporting & Presentation
- Market Analysis
- Performance Indicators

“Oversaw the development and review of revenue and expenses analysis completed on over 24 fund schedules (Functional P&L) with a budget of \$2M to \$30M for various funding sources”

“Reduced the month-end close inquiries by 60% by creating a Hyperion Financial System SharePoint site with interactive UPK training and documents”

“Led Global Chart of Accounts (GCoA) conversion for twelve (US, Austria, Europe Holdings, Germany, Germany Holdings, Italy, KCI International, Medical Resources, Switzerland, UK, UK Holdings and UK Sales) out of the sixteen entities selected to convert from existing account structure to GCoA”

TECHNICAL SUMMARY

Highly Proficient in MS Office Suite (Excel, Access, Word, PowerPoint, Project, Visio & SharePoint), Business Objects, Esbase, Oracle Hyperion, Oracle Financial Quality Management, Hyperion Smart View, Oracle, PeopleSoft, Genesis, Compass, Peachtree, Quicken Books, ADP payroll software, Internet, WebEx, AT&T Connect, Salesforce.Com and American Express at Work

PROFESSIONAL EXPERIENCE

KCI, San Antonio, TX • 2004-Present

This company is an Advanced Wound Care Solutions Healthcare firm which offers a wide variety of therapies and wound care solutions to ensure a positive experience and outcome for healthcare professionals and their patients.

SENIOR FINANCIAL ANALYST (GLOBAL FINANCE) (2011-PRESENT)

Project lead for Hyperion Upgrade from 9.3.1 to 11.1.2.1 for Hyperion Workspace and Financial Data Quality Management applications. The process included: documenting systems flow and processes, creating a test plan for User Acceptance testing, training selected users on system changes and test plan requirements during user acceptance training period, posting all upgrade related documentations on project SharePoint site, migrated data from 9.3.1 to 11,2,1 and tied out data from 2003 to current period. Prior to implementation developed final test plan for parallel close process for final system stress test.

Key Achievements

- **Designed another Hyperion Workspace application** for divested business sold which included: Presenting current financial consolidation process to company buying the business, building new application, and positing financial data monthly on secure site
- **Integrate acquired company financial data into Oracle Hyperion Workspace** financial reporting consolidation tool and Financial Data Quality Management systems which includes: Presenting month end process to newly acquired company finance team, meeting to translate acquired companies' financial data KCI's Global Chart of Accounts and Hyperion Workspace accounting structure and training Finance Team on Hyperion Workspace month-end close process
- **Conduct system administration** for Oracle Hyperion Financial System (HFM) & Financial Data Quality Management

SENIOR FINANCIAL ANALYST (ACCOUNTING COMPLIANCE) (2007-2011)

Managed the implementation of American Express Buyer Initiated Payment (BIP) program with anticipated \$14M spend volume.

Key Accomplishments

- Oversaw the automation of tracking Health Care Professional Stark Law total spend annually from various data sources
- Managed approximately 20,000 Health Care Professional spend for state and federal reporting requirements
- Administered training assistance to improve expense report submission and Corporate American Express payment, which increase KCI's American Express rebate by 18%
- Created training material and trained new hires on iExpense processes to ensure accurate Health Care Professional expense tracking
- Supervised Staff Accountant assigned to reconcile meeting and planning cards and assisted with Corporate and Pcard Administration

BUSINESS FINANCIAL ANALYST III (KCI USA FINANCE) (2004-2007)

Tested and validated excel based budget and planning process migration to planning system. Task consisted of: tracked parallel results between excel model versus planning system until results validation and approval from management, identifying errors in formulas used in the new planning database and applying validated changes.

Key Accomplishments

- Developed revenue and expense models for KCI USA sales division
- Collaborated on approved budget allocation to field service and sales departments
- Audited and tested results of revenue and expense drivers in financial planning database for quarterly forecast and annual budgetary development
- Devised short-term and long-term financial planning and analysis for the sales forces and supporting departments for USA division \$980M to \$1 billion annual budget
- Evaluated, updated and recommended changes to the revenue reflecting 10% to 20% growth with corresponding expense metrics reflecting used in financial planning estimation for all Functional P & L schedule lines
- Identified and recommended solution to Sales Force related business issues with impact analysis
- Analyzed revenue and expenses variance by presenting results to upper management through various reports and graphs
- Improved process by automating report and graph instantaneously after completion of changes requested by upper management.

CITY'S OFFICE OF MANAGEMENT AND BUDGET, San Antonio, TX • 2000-2004

SENIOR BUDGET AND MANAGEMENT ANALYST (2001-2004)

BUDGET & MANAGEMENT ANALYST (2000-2001)

- Oversaw staff and a multi-million dollar budget for Police and Fire personnel with Collective Bargaining restrictions
- Led several projects developed to increase efficiencies within the organization such as, departmental balance scorecard development, span of control study, bottom line strengthening program, delegate agency and \$100k to \$10M grant budget coordination. Produced the City's Cost Allocation
- Planned (Overhead Rates) using Generally Accepted Accounting Practice (GAAP) while meeting regulatory requirements with the advice and review of a professional outside consultant
- Improved the City of San Antonio Self Insurance funds financial standings from fiscal year \$100k to \$500K losses to balance budgets, by modifying cost allocation methods for health insurance, worker's compensation and vehicle replacement funds

Other Positions held includes Accounting III with UT Health Science Center, San Antonio TX; Accountant with Girl Scouts of the San Antonio Area, San Antonio, TX

EDUCATION

MASTER OF BUSINESS ADMINISTRATION, FINANCE CONCENTRATION,
Our Lady of the Lake University, (3.75 GPA out of 4.00; Delta Mu
Delta International Honor Society)

BACHELOR OF ARTS (BUSINESS ADMINISTRATION), ACCOUNTING
University of Texas at San Antonio, 1996 (completed degree in
3½ years while working part-time)

AWARDS/CERTIFICATIONS

Super Star Award, 2014, KCI Star Award, 2013