
OBJECTIVE:

To contribute my proficiencies in Accounting, Finance, and Economics to a role that will add value to the organization's immediate and strategic goals.

SUMMARY OF QUALIFICATIONS:

Financial planning leader skilled in managing and planning financial activities for both public and private organizations. Leads the budgeting process and oversees the preparation of financial statements and business activities. Manage and oversee forecasting (revenue and expense) reports and produce summary reports that provide meaningful information to aid the decisions of key stakeholders. Proven ability to meet rigid deadlines without compromising quality. Highly adaptable to shifts in corporate initiatives. Excellent written and verbal communication skills. Advanced computer skills, including the Microsoft Office suite and various accounting and finance applications. Approved by the Illinois Board of Examiners as a candidate to pursue CPA certification.

PROFESSIONAL EXPERIENCE:**Adler University, Chicago, IL (Aug 2021- July 2023)****Associate Vice President – Finance, Planning, and Accounting**

- Collaborates with relevant University leaders to develop short & long-term strategies and financial plans consistent with the strategic plan and in compliance with GAAP.
- Leads the development and implementation of operating and capital budgets supporting institutional short & long-term goals and priorities.
- Measures compliance with approved operating plans and report results to all internal and external stakeholders.
- Present information and report to the finance and audit committees of the board of trustees.
- In collaboration with the Institutional Advancement Office, oversees the management of operating, endowment, and investment accounts consistent with donor-required and other fund restrictions.
- Prepares and oversees annual, operating, and capital budgets, including developing volume projections, expense targets, and other financial statement items.
- Develops budget assumptions to be reviewed by the Sr. Management team and Finance committee.
- Prepares mid-year operating and cash forecast reflecting changes to key budget assumptions.
- Works with departmental budget managers, identifying opportunities to achieve and exceed budget targets.
- Completes the analysis of budget variances and obtains explanations for revenue and operating expense trends.
- Ensures the timely production of recurring and ad hoc reports requested by the VP of Finance & Operations.
- Communicates budget, financial results, and fiscal responsibility to stakeholders across the University.
- Reviews contracts for liability and contractual commitments with the assistance of legal counsel as needed.
- Advises the President and board of trustees regarding the University's fiscal health, sustainability, and growth.

Waste Management Authority, USVI (July 2021- Aug 2021)**Chief Financial Officer**

Leads, directs, and oversees the Virgin Islands Waste Management Authority's financial and purchasing activities to meet the goals and objectives established by the Board of Directors and Executive Director. Responsible for reporting accurate and timely financial results for the Authority. Ensures that all the Authority's financial and procurement activities comply with legal requirements or accepted industry practices.

Office of Management and Budget, USVI (August 2020 – July 2021)**Associate Director, Budget Review Division**

- Supervise analysts from Budget Administration and Policy Management Unit.
- Execute/administer the Budget by allocating all General Fund, other local fund appropriations, and federal grant awards via the ERP system.
- Prepare revenue and expenditure projections and reports.
- Examine, evaluate, and control budgetary operating accounts of the government departments and agencies, auditing of revenues and expenditure accounts, federal grants, and fund balances.
- Prepare written presentations and other reports for the Director and accompany the Director to legislative hearings and other meetings as necessary.
- Maintain, track, and update departmental personnel listings for all General Fund, federal funds, and all other local funds.

- Perform and prepare analyses involving budgeting, policy evaluation, auditing, and financial reporting and planning, including developing revenue projections and expenditure ceilings and developing policies and procedures to accomplish desired results.
- Prepare the Governor's Executive Budget.
- Draft legislation for new bills and amendments to current legislative acts for submission by the Governor to the Legislature for consideration.
- Provide the Director with policy analysis and fiscal impact of legislation enacted by the Legislature.

Office of Management and Budgets, USVI (May 2019 – Aug 2020)

Revenue Control Officer

- Analyzes and reviews technical reports on the financial condition of the Government of the Virgin Islands (GVI);
- Prepares comprehensive reports on revenue collections of the GVI.
- Liaison to the Revenue Estimating Conference in preparation for the compilation of the Executive Budget.
- Directs and participates in studies of past revenues and expenditures and develops estimates of future revenues and expenditures based on analysis of data compiled.
- Reviews, recommends, initiates, and revises new and improved methods, policies, and procedures for revenue forecasting.
- Communicates with pertinent stakeholders the results of the information researched.

Office of Management and Budgets, USVI (Feb 2016 – May 2019)

Senior Budget Analyst/Certified Six Sigma Black Belt Consultant

- Perform budget research and analysis for various government agencies.
- Review revenue and expenditure projections across funds to determine viability and reasonableness.
- Perform financial forecasting and statistical analysis of government funds.
- Serve as finance manager for various departments and agencies.
- Conduct financial performance analysis.

Office of Management and Budgets, USVI (May 2018 – August 2018)

Associate Director, Policy Management Unit (Temporary)

- Direct and supervise Senior Budget Analysts and the Senior Budget Coordinating Officer,
- Perform analyses involving budgeting, policy evaluation, auditing, and financial reporting and planning,
- Develop policies, procedures, revenue projections and expenditure ceilings,
- Draft legislation for new bills and amendments to current Legislative Acts,
- Provide the director with policy analysis and financial impact of bills approved by the Legislature,
- Develop fiscal policy initiatives,
- Develop, maintain, and update database files on special reports relative to revenue and expenditure patterns,
- Prepare written presentation for the Director of OMB and occasionally attend Senate Hearings on legislative matters,
- Review federal grants applications by departments for budgetary and financial sufficiency when local matches are required.

Rudmac Constructions, Charlotte Amalie, USVI (Oct 2012 – April 2016)

Operations Manager

- Direct annual budgeting and planning process.
- Oversee monthly and quarterly forecasts of financial performance against budgeted financial and operational goals.
- Develop individual program budgets.
- Oversee financial management and planning of projects.
- Oversee processing of accounts receivable and payable.
- Administer payroll, employee benefits, and organizational insurance.

Cook County Dept. of Revenue, Chicago IL (April 2015 – Feb 2016)

Field Auditor-Revenue

- Apply knowledge of County, State, and Federal laws, ordinances, regulations, policies, and procedures in collecting County taxes and fees.
- Perform a critical and thorough review of Cook County entities' financial statements through the application of superior accounting knowledge.
- Ascertain compliance with laws, home rule tax ordinances, and regulations.
- Objectively and tactfully communicate with an array of Cook County business owners, operators, or taxpayers, including cases of reluctance.

Predict Labs, Chicago IL (Oct 2014 – April 2015)

Assistant Accounting Manager

- Monitored and analyzed department work to develop more efficient procedures and use of resources while maintaining a high level of accuracy.
- Responded to inquiries from the CEO and other senior officers regarding financial results, special reporting requests, and ad-hoc projects.
- Ensured that monthly and quarterly Bank Compliance activities were performed in a timely and accurate manner.
- Performed variances analyses vs. budget and prior periods, which were integral to management decision-making.
- Issued and reviewed financial statements.
- Processed payroll bi-weekly.

Alliance for Audited Media, Arlington Heights, IL (July 2013 – April 2014)

Auditor

- Coordinated and completed multiple in-house audit assignments.
- Reviewed financial statements and other records using acceptable accounting procedures to assess financial condition.
- Reviewed circulation records for national and local Newspapers and Magazines publications.
- Performed various analyses to allow a better understanding of publications' circulation trends.

Child's Play Touring Theater, Chicago, IL (Dec 2009 - Feb 2010)

Assistant Accountant (Temporary)

- Managed reconciliation of accounts payable and accounts receivable for the fiscal year.
- Prepared periodic profit and loss statements and reviewed payroll documents to ensure accuracy.
- Audited financial documents to ensure GAAP compliance.

Chicago Park District, Chicago, IL (Jul 2009 - Oct 2009)

Financial Auditor (Project)

- Oversaw the review of financial operations and conducted financial audits for Chicago area public parks and co-sponsored events.
- Analyzed annual reports and financial statements to determine financial condition and facilitated financial planning.
- Inspected cash on hand, notes receivable and payable, and canceled checks to confirm records were accurate.
- Generated recommendations regarding the extent of further financial review for all North Chicago parks.

Roosevelt University, Chicago, IL

Student Activities Funding Committee, Center for Student Involvement (Jan 2008 - May 2009)

Budget Manager

- Managed income from, and the allocation of funding to all Roosevelt University student organizations;
- Presented quarterly and annual budgetary updates and forecasts to student and administrative bodies.

EDUCATION:

Roosevelt University, Chicago, IL - Master of Arts, Economics (Dec 2012)

- President of Economics Research Club;

- Vice-President of the Economics Roundtable/ Event Coordinator for the Department of Economics.

Roosevelt University, Chicago, IL - Bachelor of Science, Accounting with Economics Minor (May 2009)

- Roosevelt Scholars Program;
- Roosevelt University Programming Board.

INTERNSHIPS & ASSISTANTSHIPS:

Roosevelt University Graduate Researcher, Chicago, IL (Jan 2012 - Aug 2012)

- Graduate Research Assistant, Dr. Stephen Ziliak, Ph.D.
The Center for Tax and Budget Accountability, Chicago, IL (Oct 2011 - May 2012)

- Research Intern

The Ritz-Carlton – Four Seasons Hotels, Chicago, IL (May 2010)

- Accounts Payable and Receivables Clerk

FirstBank, Virgin Islands, St. Thomas, USVI (May 2008 - Sept 2008)

- Merchant Services Representative

Roosevelt University Undergraduate Research Program, Chicago, IL (Jan 2008 - Aug 2008)

- Undergraduate Research Assistant, Dr. Stephen Ziliak, Ph.D.

REFERENCES:

- Available upon request.