

## BUDGET FINANCE SPECIALIST SENIOR

### Summary

Dynamic finance professional with a strong background in all aspects of accounting and financial management. Successful at managing multiple assignments while meeting tight deadlines.

### Highlights

- Financial analysis
- Complex problem solving
- Financial reporting expert
- Account reconciliation
- Self-motivated professional
- Revenue/Expenses management
- UFARS
- Superior time management
- PeopleSoft expert
- Bookkeeping
- SAP/MS Office Suite (Excel)
- Budgeting expert
- Business process improvement
- School Finances

### Accomplishments

- Promoted to senior role with added responsibility of managing 3-person team of Budget/Finance Specialists and 1 Senior Account Clerk
- Successfully managed aging invoices by reducing the number of invoices from 900 invoices to less than 200 in the work flow within 2 days
- Improved cost efficiency of School Districts travel system
- Awarded 5-Star Customer Service by recognizing outstanding customer service that "goes above and beyond normal duties", acknowledging consistent dedication in support of clients and colleagues
- Successfully trained account clerks and secretaries in using SAP

### Experience

Company Name October 2007 to Current Budget Finance Specialist Senior

City, State

- Co-supervise and co-lead activities for a team of 3 Budget Finance Specialists and 1 Account Clerk Cadre.
- Responsible for training any new team members, giving work direction to all team members, lead the team during fiscal budgeting process, ensure fiscal responsibility throughout key areas of organization by reviewing and strengthening efficiencies in financial controls, conducting budget analysis and strategic planning to aid in daily business decisions.
- Train and advice school officials and administrators on use of public funds and donations to ensure compliance and transparency.
- Create financial reports and documents to guide and complete the annual budgeting process for upcoming school year and support organizational objectives.
- Manage 144 funded project accounts (Donations) which generate nearly \$12.5 million in revenue annually.
- Responsible in creating accounts, managing both revenue and expenses, carry over any unspent money from one year to the next, and communicating the appropriate use of funding to the recipients.
- Manage financial record for 25 schools-provide financial analysis, financial planning and budget oversight to principals in order to effectively make daily operation and annual budgeting decisions.
- Train clerks and principals on the appropriate usage of public funds, financial management system SAP, and UFARS coding
- Oversee position control and resolve questions on budget and other financial and technical transactions
- Work closely with Human Resources regarding positions, salary and confidential employee information
- Work closely with Procurement on approving and or preparing requisitions to PO and Accounts Payable on resolving payment processing issues
- Improved cost efficiency of School District's travel system by ensuring accuracy of budget coding, budget availability and authorization.

Company Name July 2006 to October 2007 Accounting Specialist III

City, State

- Responsible for daily accounting transactions in the Trust Fee Unit including processing payments sent by trust clients.
- Diligently monitored accounts and worked closely with internal team members and external stakeholders to reduce account delinquency and by utilizing quick and decisive analytical thinking and extensive research.
- Produced daily business transactions and monthly financial reports and analysis to upper management for audit and to aid in crucial daily banking operations.
- Awarded 5-Star Customer Service Award in 2007-recognized outstanding customer service that "goes above and beyond normal duties", acknowledged consistent dedication in support of clients and colleagues.

Company Name September 2005 to July 2006 Loan Analyst/Customer Service Representative  
City , State

- Reviewed and analyzed financial documents and loan applications for home loans.
- Verified compliance with federal requirements and ensured conformity to Wells Fargo Funding and investor requirements.
- Conducted extensive research to support loan decisions and resolved complex issues.
- Developed "in house" expertise for above-average knowledge of tax penalties and other "fine print" liabilities that were crucial to proper loan administration.
- Regarded as thorough and courteous professional by peers and clients, known for consistent delivery of high-level customer support particularly through challenging loan applications.

#### Education

2015 Supervisor Training City , State

University of Wisconsin 2005 Bachelor of Science : Business Administration-Finance City , State

Business Administration-Finance

#### Skills

- Accounting: Financial Audit, General ledger, AP, Purchasing, Quickbook
- Finance: Budgeting & forecasting, financial analysis & planning, revenue/expenses management, financial control, process improvement, technical presentations
- People skills: Customer service oriented, result-oriented and goal driven, attention to detail, flexible, self-motivated, problem solver, team player, dependable, initiative, dedicated, honest, passionate, multi-task