

## Client Name

Contact information

## Summary of Qualifications

In my role as an Accountant and Auditor, I analyze key financial data and KPIs to prepare senior management reporting and external communications to stakeholders. My role extends beyond routine accounting reporting functions: I develop financial models and analytics, work with account managers to communicate performance to clients, and collaborate with financial analysts to assess new business development opportunities. Through my expertise with implementing systems, I support continuous process improvement initiatives.

## Selected Accomplishments

- Implemented system designed to generate customer profitability by correcting bugs identified during beta testing
- Project managed implementation of general ledger for new subsidiary, scoping project requirements and meeting deliverables on time
- Chosen by senior management to attend leadership training seminar in Norway based on performance and potential
- Spokesperson for finance team on the Business Plan Portfolio Committee that presents portfolio and financial information to senior management

## Professional Experience

**XXX Bank ASA**

2009 – present

**Vice President – Accounting**

(promoted from AVP position after four years)

- Analyze Key Performance Indicators (KPI), including Risk Adjusted Return on Capital (RAROC) and economic profit for monthly report to senior management on business units in the Americas
- Maintain deal flow commentary and financial highlights for MIS report on healthcare and other units
- Deliver training on regulatory reporting, accounting system, customer profitability systems, and other competencies
- Coordinate annual “actual vs. plan” analysis and 3-year budget forecast
- Reconcile customer profitability and portfolio credit risk rating reports in order to analyze fluctuations with Relationship Managers
- Collaborate with General Counsel and Tax Attorney regarding Service Level (SLA) and Transfer Pricing Agreements (TPA)
- Conduct gap analysis and procedural updates on Foreign Account Tax Compliance Act (FATCA) system implementation
- Supervise withholding tax accountant and temporary staff
- As Assistant Vice President, worked on reporting required for monthly closing statements, General Ledger system supervision to identify unusual balances, verify accounts and to set up posting pointers for interest-bearing accounts
- Prepared regulatory reports to the Federal Reserve, Cayman Island Monetary Authority, Bureau of Economic Analysis, and US Treasury

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### **KPMG, LLP**

2005 – 2009

#### **Senior Associate – Internal Auditor**

- Performed internal audits for a variety of practice areas to ensure Sarbanes Oxley compliance
- Audited Investigational New Drug and Clinical Trials, Underwriting, Reinsurance Accounting (recalculation of Financial & Investment Packages and MD&A), SEC Compliance, Capital Structure (Stock Options Granted and Expenses), Accounts Payable, Cash, Revenue, Investments (FAS 157 and OTTI), Financial Reporting, Conduits, GICs, SAS 70, Tax (FIN 48 & recalculation of Reporting Packages and ETR), Payroll, Entity Wide and Legal Transactions, Financial Statement Consolidation and Rating Agency Models
- Reviewed internal controls to identify potential operational gaps and recommend remediation
- Recalculated 10Q/10K financial statements and footnote disclosures prior to SEC filing

### **American International Group (AIG)**

2004 - 2005

#### **Associate Internal Auditor**

- Performed internal audits of financial services and asset management operations
- Proposed post-audit recommendations to improve internal control or efficiency of potential risks

### **The Bank of New York**

2002 – 2004

#### **Mutual Fund Accountant (summer internships)**

- Conducted financial research on mutual fund performance

## **Software**

AS400, CADMIS, Call Reporter Premier, Zenit Global, FINLIS, MITA, CPS, SAP

## **Education**

State University of New York at New Paltz

B.S. - Accounting