

EXPERIENCE:

Philadelphia Energy Authority, Philadelphia, PA January 2024 – Present

Finance Director

- Manage the day-to-day financial operations of the Authority
- Lead financial and budgeting activities including grants management and contracting
- Oversee monthly and quarterly management finance reporting
- Assess and implement streamlined financial processes to ensure efficiency, transparency, and accountability
- Manage annual audits and provide strategic financial analysis and planning to ensure compliance, optimization of assets, risk management and more
- Oversee the recruitment and management of consultants and others as needed

OIC Of America, Philadelphia, PA February 2019 – January 2024

Finance Manager

- Lead the financial planning process and the development of the master budget
- Provide monthly budget forecast and variance analysis
- Perform monthly & quarterly financial analyses for OICA & affiliates
- Review, process, & approve monthly draw requests & expense reports for subgrantees
- Manage OICA Direct & indirect FTE allocation
- Implement strong internal controls and financial procedures for effective grant and fund management
- Lead the affiliate fiscal performance through monthly scorecards
- Oversee the management of restricted funds, grants, and contracts, ensuring compliance with donor requirements and regulatory guidelines.
- Managing government contracts to ensure effective and efficient execution of contractual agreements between the government and OICA
- Assist affiliate with spend down plans & budget modifications
- Perform affiliate subgrantee onboarding & ongoing Fiscal TA
- Prepare, allocate, & process all OICA invoices
- Assist with Ad-hoc requests and projects

JP Morgan & Chase, Newark, DE August 2018 - February 2019

Financial Reporting Analyst

- Performed various data analysis to manage and to produce the monthly consolidation of income statement and balance sheet
- Performed weekly risk analysis and report monthly P&L at risk items
- Performed various control procedures to ensure the integrity of reported financial results
- Performed month and quarter end reconciliation and substantiation reports
- Communicated with different business partners to ensure understanding of monthly profit and loss, revenue drivers, and risk reports

- Developed and maintained daily financial reports and schedules
- Participated in all aspect of the production of the monthly financial Flash Report
- Supported ad-hoc requests for financial information received from across the firm

THE VANGUARD GROUP, MALVERN, PA June 2017 - August 2018

Brokerage Investment Professional Series 7 & 63

- Explained, assisted, and traded Mutual Funds, Stocks, and ETF for clients
- Reviewed portfolio development to identify risk drivers and levels in relation to market development and to client tolerance and objectives
- Provided clients with guidance regarding their investments and overall portfolios
- Confirmed wire instructions and ensured all transactions and trades are properly funded
- Proactively identified and explained trading restrictions, saving financial losses to client/firm by avoiding trading violations such as freeriding, trade liquidations, wash sale, and frequent trading or market-timing
- Explained cover and uncovered, qualified and unqualified dividend, capital gain/loss, interest payable, fees charged, and expense ratios.
- Provided excellent client experience by implementing improved changes in operational procedures
- Elaborated on fund performance and management
- Identified areas of inefficiency and create time saving solutions including best practice procedures as well as better workflow organization
- Developed standard processes to route customer queries to appropriate department for timely resolution

EDUCATION: TEMPLE UNIVERSITY, Fox School of Business, Philadelphia, PA
Bachelor of Business Administration May 2017
Major 1: Accounting | Major 2: Finance |

SUMMARY OF SKILLS:

Strong knowledge of accounting and financial statement analysis
 Strong Knowledge of federal & nonfederal grant budgeting.
 Skilled in performing analysis of equity valuations and value investing
 Adept in financial modeling and investment analysis
 MS Office, Bloomberg, Morningstar, eMoney, FactSet, Revport, FundEZ