

FIRST MIDDLE LAST

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HIGHLIGHTS:

Financial Modeling

Excel Modeling

Business Process Improvement

Data Analysis/Visualization

Quantitative Analysis

Prioritization

Complex Problem Solver

Communication

Adaptability

CERTIFICATIONS:

Financial Modeling and Valuation Analyst Certificate – Corporate Finance Institute

CFA Level 1 Candidate

Certified Six Sigma Black Belt

EMPLOYMENT HISTORY:

WorkPlace - Corporation

City, CA Division

Financial Analyst Apprentice

September 2018 to Present

- Help to perform quarterly financial analysis (operating performance vs. budget) on a \$10M annual budget.
- Assist in coordination and maintenance of systems to support management in financial control and decision making.
- Help to develop studies relative to profitability, pricing, cost reduction initiatives, capital expenditure, cash flow, and return on investment.
- Participate in the development of long and short range financial plans.

Quality Engineer

June 2016 to September 2018

- Performed statistical analysis in Excel to achieve special process compliance, product improvement and reliability.
- Participated in continuous improvement by: evaluation of data, determining process limits to optimize business operational plans, and establishing and reviewing periodic testing.
- Assisted management in various departments, generated reports for customers, performed R&D, and delivered presentations on projects to senior management.
- Improved product throughput by 40% and reduced waste by 50%, thus generating \$16,000 in annual savings.

Quality Analyst

December 2016 to June 2017

- Performed cost analysis and evaluated return on investment for continuous improvement projects with savings of over \$150K.
- Utilized Measurement Systems Analysis and Six Sigma techniques to promote processes improvement.
- Analyzed designs to determine best inspection methods.
- Used Pivot Tables and V-lookups to collect and analyze data in collaboration with engineering and management to support business decisions.

SPECIAL PROJECTS:

- Developed a short-term stock price forecasting tool using the ARIMA model in R-Studio; the model produced stock price predictions at nearly 60% accuracy.
- Improved an auto regressive model (ARMA+GARCH) in R to predict directional changes of the CBOE Volatility Index using 1000+ observations.
- Utilized the autoregressive model to perform a historical back test by creating a portfolio of common stocks and ETF's to match the VIX index movements.
- Senior Thesis: Analyzed how government policies and various macroeconomic indicators affect the success of the U.S. stock market.

EDUCATION:

Currently attending California Polytechnic State University, Pomona

- Bachelors of Science, Quantitative Economics, May 2019

- **Relative Coursework:** Economic Forecasting, Economic Programming and Optimization Analysis, Money and Banking, Financial Accounting for Decision Making, Econometric Methods, Mathematical Economics, Economic Statistics, Macro/Microeconomics
- **Computer Skills:** Microsoft Excel (v-lookup, pivot tables, macros, conditional formatting, formulas, statistical packages, dashboards) • R • Python • SQL Developer (Beginner Level) • Alteryx (Beginner Level) • Tableau • Minitab • ERP systems