

# ROBIN FINANCIAL, MBA, CFA

860 Peachtree St NE 2206 • Atlanta, GA 30308 • 404-875-2688 • robin@robinresumes.com

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## SENIOR FINANCIAL ANALYST

Financial Services • Energy • Restaurants • *Top Secret (SCI) Clearance*

***“Robin’s visionary financial modeling leads to strong client gains,” Senior Vice President, INTERNATIONAL INVESTMENTS***

Accomplished, multilingual FINANCIAL ANALYST with a strong record of international success in the financial marketplace, restaurants and energy sectors. Leverage skills gained while earning a Master of Business Administration from Emory University, Goizueta Business School and a Bachelor of Science in Business Management from the Georgia Institute of Technology (Georgia Tech). Demonstrate broad success throughout career in increasing assets managed, mitigating risks, providing financial analysis modeling and support, driving growth, monitoring and managing funds and providing organizational leadership. Deliver key strategies leading to millions in improved performance with streamlined operations.

Financial Analysis • Statistical Analysis  
Customer Satisfaction • Service Levels  
Mitigating Risks

Portfolio Management  
Goal Attainment • Results  
Customer Attainment • Customer Retention

Leading People • Team Building  
Strategic Planning  
Return on Investment (ROI)

**National Association of Securities Dealers (NASD) Series 7, 63 and 66 Licensed • Chartered Financial Analyst (CFA) • Six Sigma Green Belt**

Society of Financial Analysts • CFA Institute • Professional Risk Managers' International Association (PRMIA)

Fluent in Portuguese and Spanish

## HIGHLIGHTS OF EXPERIENCE

- **INTERNATIONAL INVESTMENTS COMPANY: Achieved 47% average year-to-year portfolio growth (2007-2010), outperforming 38% benchmark by 900 Basis Points (bps)** through superior financial modeling and due diligence.
- **BIG BANK: Facilitated extreme division growth, doubling in size annually, as the only financial resource for the division** by supporting three successful reorganizations with a disciplined approach.
- **BIG RESTAURANT HOLDING COMPANY: Increased profit margins 5%** by recommending and implementing processes to properly determine hourly labor needs based on analyzing hourly labor reports and corresponding with franchisees to investigate labor balances.
- **FUTURE HOLDINGS: Ensured due diligence for \$20 million divestiture of NON ENERGY TRUST** by applying sound accounting principles

## PROFESSIONAL EXPERIENCE

INTERNATIONAL INVESTMENTS COMPANY, Atlanta, GA

6/2007 - Present

*Investment company with \$2 billion in financial holdings in the United States and Brazil*

### Senior Portfolio and Risk Manager

Manage \$400 million assets for more than 250 high net worth and institutional accounts in both the United States and Brazil. Allocated Exchange-Traded Fund (ETF) assets based on financial modeling, investment strategies and risk management. Analyze stocks and other funds to be invested in by creating financial models and evaluating company reports. Establish Value at Risk (VaR) limits for funds. Develop daily regulatory and managerial risk reports. Present information to clients and senior company staff.

- **Achieved 47% average year-to-year portfolio growth (2007-2010), outperforming 38% benchmark by 900 Basis Points (bps)** through superior financial modeling and due diligence.
- **Mitigated risk** by providing liaison with the Risk Department to develop and establish new credit approval procedures for funds.
- **Grew client base 20%** by building coalitions with major companies in Brazil and providing superior customer service.

BIG BANK, Atlanta, GA

8/2005 - 5/2007

*U.S. and international financial holding company with more than \$30 billion revenues and 410,000 employees.*

### Senior Financial Analyst

Delivered superior financial analysis through strategic planning, budgeting, monthly and ad hoc reporting, forecasting, cost allocation, capitalization and month-end processing, including accruals and expense reclassification to support an expanding \$100 million loan origination software development division with 8 cost centers and 120 staff in 2005, growing to more than more than 1000 staff by 2007. Implemented software development capitalization methodology per American Institute of Certified Public Accountants (AICPA) SOP98-1 requirements.

- **Facilitated extreme division growth, doubling in size annually, as the only financial resource for the division** by supporting three successful reorganizations with a disciplined approach.
- **Enabled IT management to assume responsibility for their own budgets after reorganization and split from a centralized IT organization** by establishing financial reporting procedures for division and then educating the entire senior management team on finance.
- **Ensured fairness of cost allocation during division growth** by collaborating with division management and clients to develop new methods to collect data and then develop allocation metrics approved by division and executive management and clients.

BIG RESTAURANT HOLDING COMPANY, Atlanta, GA

5/2003 - 8/2005

*Holding company for major restaurant chains***Senior Financial Analyst**

Prepared weekly and monthly financial analysis packages for 50 company-owned restaurants, including bank consolidation, Profit and Loss (P&L), Accounts Payable (A/P), Accounts Receivable (A/R) and Costs of Goods Sold (COGS) information by leading and mentoring a 3-person accounting and finance department team for a \$150 million annual operation. Recommended product pricing strategies and forecasted advertising costs.

- **Enhanced company's image** by operating and maintaining the entire restaurant systems national advertising fund.
- **Drove high Return on Investment (ROI) for \$5 million investment in a new restaurant** by providing key financial analysis.
- **Increased profit margins 5%** by recommending and implementing processes to properly determine hourly labor needs based on analyzing hourly labor reports and corresponding with franchisees to investigate labor balances.

FUTURE HOLDINGS, Atlanta, GA

3/2000 - 5/2003

*Energy company with regulated and competitive subsidiaries***Senior Financial Analyst - Trust Investments (3/2001 - 5/2003)**

Administered, monitored, and managed \$100 million company trust funds, including qualified defined contribution/defined benefit plans, non-qualified plans, and nuclear decommissioning trust by leading financial analyst team. Coordinated trust activity with human resources. Managed money manager relationships and evaluated manager performance. Established investment policies; planned and conducted fiduciary committee meetings. Researched and documented financial statement effects of non-qualified plans for senior management.

- **Proposed a \$12 million benefit plan savings** based on research as a team member on a special project with the human resources team.
- **Ensured due diligence for \$20 million divesture of NON ENERGY TRUST** by applying sound accounting principles

**Senior Financial Analyst – Financial Reporting and Corporate Accounting (3/2000 - 3/2001)**

Prepared subsidiary SEC 10-K and 10-Q's. As a Tax Section team member, planned, managed, and reviewed the monthly calculation and recording of current and deferred income taxes to the general ledger, prepared income tax reports and presentations and supervised 3 financial analysts.

- **Reduced workload 75% and eliminated errors** by streamlining the royalty payment process through implementing automated processes.
- **Slashed payment posting time from 6 to 3 days and eliminated redundant processes** by reevaluating workflow for accounts receivables.

WEALTH ASSOCIATES, LLC, Atlanta, GA

6/1998 - 3/2000

*Full service insurance agency specializing in real estate planning***Senior Business Analyst**

Provided sales and organizational leadership, management and direction to grow sales and profitability by overseeing and motivating 5 employees/brokers and accountants. Developed infrastructure to improve business processes, establish customer service relationships and implement compliance controls. Created sales, marketing and website materials.

- **Repositioned company for profitability, slashed time to close deals from 300 to 120 days, increased deal flow potential 400%** by developing and implementing new deal management process which reduced customer confusion and emphasized customer relationships.
- **Increased pipeline from \$10.5 million in 1998 to more than \$60 million in 1999** by implementing excellent sales and management operations, including new deal and profitability tracking systems and customer relationship follow-up guidelines.
- **Developed financing structure for a \$185 million case with multiple insurance carriers and a credit facility** to handle insurance premium.

*Previous experience: Risk Analyst, HOME COMPANY; Finance Trainee, BIG BANG COMMUNICATIONS***EDUCATION / TRAINING**

**Master of Business Administration (MBA) in Finance**, EMORY UNIVERSITY, GOIZUETA BUSINESS SCHOOL, Atlanta, GA, 6/1998, GPA 3.8/4.0  
**Bachelor of Science (BS) in Business Management (Finance)**, GEORGIA INSTITUTE OF TECHNOLOGY, Atlanta, GA, 6/1991, GPA: 3.7/4.0

Effective Communications • Chartered Financial Analyst (CFA Institute)

**AWARDS**

Beta Gamma Sigma Honor Society • Future Holdings High Achiever Award • International Investments Top Performer Award

**AFFILIATIONS**

SafeHouse Outreach • Emory University Mentor Program • Atlanta Chamber of Commerce • Toastmasters

**TECHNICAL EXPERTISE**

Microsoft Office (Word, Excel, PowerPoint, Access, Outlook, Publisher), Microsoft SharePoint, Visual Basic, HTML, Java, Salesforce.com