



### Senior Crystal Reports Consultant

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CENDIEN CORP: **(214) 245-4580**

<http://www.cendien.com>

## Senior Crystal Reports Developer – Cendien – Crystal Reports Experts

### Crystal Reports Professional Services

A highly motivated and effective financial and database analyst with seven years of broad ranging experience in financial service industry.

### Crystal Reports Technical Skills

Proficient in Crystal reports, Excel, Access, FRX, Knowledgeable in oracle and SQL database and analytical packages

### Crystal Reports Clients / Experience

#### Insurance Company Client

##### Senior Database Analyst

- Build customized broad range financial and operating reports for the executives and agency reports over web.
- Analyze competitors' data, market share and present rating projections to top management
- Analyze insurance daily and monthly operation activities which include production, underwriting and claim activities.
- Perform data pull and balancing analysis for regulatory filings and audits.
- Designed and developed the complete financial reports package, which includes monthly financial reports, budget variance analysis, ratio analysis and chart reports.

#### Bank Client

##### Financial Analyst

- Build customized financial reports for bank and branch centers based on in-depth knowledge of bank operation and needs of managers.
- Analyzed quantitative economic data, market trends and presented explanations of complex concepts to bank managers. Participated in creation of client's demographic report.
- Analyzed banking activities include cash, wire and ATM transaction reports, kitting report, new accounts monitor report and provided important insight for top management.

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14875 Landmark Blvd., Ste. 100 Dallas, TX 75254

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- Performed money fund flow and loan analysis for valuation of new and existing banking clients.
- Designed and developed early fraud detection system to detect unusual client and employee activity which was being conducted for illegal or improper purpose

### Financial Investment Client

#### Financial Analyst

- Build financial and analytical models that utilize both financial and non-financial data to disseminate data, which provided important information for top executives to make critical management decisions.
- Provide special projects/sales and budget analyses for the top executives of Waddell & Reed and the Legend Group executives. Special projects were areas of sales and sales forces analysis, static and flexible budget analysis, and branch profit and loss analysis, both internal and external.
- Design and supply monthly management and sales reports that include commentary reflected issues of the respective periods. These included Legend Key Operating Data reports, Branch Offices sales summary reports, Selected Advisors Productivity reports, Equity investments comparison and Advisors Commissions Reports.
- Standardized and automated the financial reporting process for all branch offices, generated timely branch financial statements, which resulted in a 75% decrease in man-hours.

#### Supervisor of Investment Advisory Department

- Provided special projects/ad hoc analyses for Chief Financial Analyst, management and retail sales forces.
- Provided suggestive overviews of market conditions, asset allocation guidelines, sector weightings, and fund recommendations for top management.
- Managed junior staff and summer interns, which consisted of five people.

#### Staff Accountant

- Assisted in monthly GAAP financial preparation. Verified all transactions were handled in accordance with GAAP and company policies. Maintained perpetual cash flow reporting.

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- Bank reconciliation of all companies and all accounts.
- Prepared bank reconciliation reports and maintained records.
- Reconciled Employee Benefit Custodial Accounts (EBA) and Loan Distribution department books daily.
- Verified check totals, deposits, taxes withheld, money on hold and unprocessed amounts to detailed listings.
- Reconciled EBA receipts and disbursement to mutual fund registers daily.
- Helped create and supply capital gain reports to show capital gains short and long, realized and unrealized.
- Maintained and updated detailed reports on furniture, equipment, and leasehold improvements. Computed and recorded depreciation according to tax categories.
- Helped prepare state tax returns for all companies in 50 states. Tracked estimated deposits and payment needed.

### Crystal Reports Education / Certifications

University of Colorado, Boulder CO  
Master of Business Administration, Accounting  
Bachelor of Business Administration, Accounting

CERTIFICATIONS: Certified Public Accountant, State of Florida

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**Crystal Reports – CENDIEN Hyperion Consulting and Staffing Services**

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