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Logan Ward

Senior Financial Analyst

ABOUT ME

An accomplished finance professional bringing expertise in financial reporting, cash flow management, and compliance & risk management, backed by proven results at Morgan Stanley and Bank of America. Adept at employing financial software to conduct comprehensive analysis, effective budget planning, and successful risk mitigation strategies. Recently earned Certified Financial Planner® designation.

PROFESSIONAL EXPERIENCE

Senior Financial Analyst

Morgan Stanley, New York, NY | June 2019 - Present

- Perform comprehensive financial analysis to guide executive decision-making, resulting in a 15% increase in operational efficiency within six months
- Coordinate and implement financial forecasting, reporting, and operational metrics tracking, improving transparency in fiscal planning
- Lead risk management processes by identifying potential risks and designing mitigation strategies, ensuring steady growth and profitability

Finance Associate

Bank of America, Boston, MA, City, ST | May 2018 - May 2019

- Managed cash flow processes to ensure operational costs were covered while identifying key investment opportunities that boosted ROI by 8%
- Assisted with preparing financial reports and budgets, streamlining the month-end close by two days
- Contributed to regulatory compliance initiatives, introducing measures that reduced financial discrepancies by 20%

CERTIFICATIONS

- Certified Financial Planner® (CFP®), CFP Board, June 2015
- LEED Accredited Professional (LEED AP), U.S. Green Building Council, February 2017

CONTACT



(123) 456-7890



email@example.com



LinkedIn | Portfolio



City, State Abbreviation,
Zip Code

KEY SKILLS

- Budget planning & forecasting
- Financial analysis
- Finance software proficiency
- Risk management & compliance

EDUCATION

Bachelor of Science in Finance

University of Pennsylvania – The Wharton School, Philadelphia, PA
May 2018