



Terry Roberts


Finance Director

An experienced finance leader with an MBA and a track record of steering financial strategy at IBM and Bloomberg. Adept at improving economic positions, ensuring legal compliance, and leading high-performing teams. CPA and CFA credentials underline a robust skill set in advanced financial analysis, regulatory adherence, and team management.

 City, State Abbreviation, Zip Code

 (123) 456-7890

 email@example.com

 LinkedIn | Portfolio

KEY SKILLS

- Advanced financial analysis
- Regulatory & compliance expertise
- Strategic planning & modeling
- Leadership & team development

CERTIFICATIONS

- Chartered Financial Analyst (CFA), CFA Institute, May 2023
- Certified Public Accountant (CPA), AICPA, May 2021

PROFESSIONAL EXPERIENCE

SENIOR FINANCE MANAGER | IBM, BOSTON, MA

JANUARY 2019 – PRESENT

- Developed and implemented long-term financial strategies that improved company profitability by 30% over five years
- Managed complex financial reporting processes, ensuring conformity with GAAP and corporate standards, reducing audit findings by 50%
- Supervised a team of 12 junior finance specialists, overseeing hiring, training, and mentoring, resulting in a 25% increase in team productivity

FINANCIAL ANALYST SUPERVISOR | BLOOMBERG, STANFORD, CA

JULY 2016 – DECEMBER 2018

- Executed strategic financial planning and designed models predicting market trends, aiding decisions that generated a 10% revenue uplift
- Maintained compliance with financial regulations by overseeing all company financial operations, establishing controls that cut discrepancies by 35%
- Led cross-functional teams and improved stakeholder communication, securing two new financing deals worth \$50M

EDUCATION

- Master of Business Administration (MBA)
Harvard Business School, Boston, MA | May 2019
- Bachelor of Science in Finance
University of Pennsylvania – The Wharton School, Philadelphia, PA