

Jodie Castleton

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PROFILE SUMMARY

Senior Financial Analyst

Analyzing Financial Data & Driving Business Decisions

Senior Financial Analyst with 5+ years of progressive experience in financial services. Strong research and analytical skills with a firm understanding of accounting processes, procedure, and internal controls. Confident team leader with good communication skills. Expertise in general ledger accounting, financial reporting and analysis, and journal entries. Able to adapt quickly, learn new tasks, and manage competing priorities.

Technical Skills: TM1 (enterprise planning), Essbase (analytical processing)

- CORE COMPETENCIES -

- Financial Reporting & Analysis
- P&L Management
- Financial Planning & Budgeting
- Financial Project Management
- Variance Analysis
- Strategic Planning & Execution
- Team Leadership
- Product Control
- Change Management

PROFESSIONAL EXPERIENCE

The Acme Corporation

Chicago, IL

The Acme Corporation is a fictional corporation that features prominently in the Road Runner/Wile E. Coyote cartoons.

Financial Consultant – Contract

3/2016 to Present

Provide one-on-one consultation to the CEO / Owner to manage growth and streamline operations across multiple areas of the business including finance, sales, marketing, and operations. Standardize cost and revenue reporting, analyze prior year financials, and determine primary cost and revenue drivers.

KEY ACHIEVEMENTS

- Discovered cost and input opportunities leading to a 30% reduction in annual budget.
- Developed a comprehensive social marketing strategy to grow awareness and attract new customers.
 - Established the company's presence on major platforms including Facebook and Twitter.
 - Conducted market research, identified target audience, and constructed a 5-year growth plan.
- Prepared a customized spreadsheet to streamline operations for tracking / reporting data.
 - Analyzed business operations and identified inefficiencies within the process.
 - 20% improvement in operational efficiency and \$50K in annual savings achieved.

Credit Suisse

Chicago, IL

Credit Suisse is a leading global financial services company.

Senior Financial Analyst / Officer – CFO Group

1/2009 to 2/2016

Developed budget and forecast models for expenses to reflect current market and deal flow. Served as the point-person for senior leadership, deal teams, and shared services for tracking group performance. Budgeted, planned, and forecasted expenses. Compiled and submitted financial data using enterprise planning software.

KEY ACHIEVEMENTS

- Created and edited pitch decks for Investment Banking Department CFO and senior management.
 - Tracked financial performance metrics including pre-tax income and expense recovery rates.
- Devised an automated process to handle excess financial tracking and reporting duties.
 - Developed a new spreadsheet to accurately pull and sync data from multiple files.
 - Saved time and financial resources by developing an improved data reporting process.

Professional Experience Continued...

Sprint Corporation

Chicago, IL

Sprint is a major telecommunications company providing wireless services nationwide.

Financial Analyst / Product Controller

5/2005 to 12/2008

Reconciled and reported daily / monthly P&L for multiple sales and trading desks. Oversaw and directed a five-person team to consistently meet monthly deadlines for regulatory reporting. Managed 2,000+ balance sheet accounts for month end reconciliation within the securitized products group (SPG).

KEY ACHIEVEMENTS

- Oversaw training and development of new hires and directly mentored an intern.
- Led a cross-divisional team of six to redesign the redemption process for Non-Agency RMBS securities to improve its flow and remove bottlenecks.
 - Developed greater collaboration between stakeholders from each team involved in the process.
 - Established quality controls to identify and crosscheck inaccurate redemptions.
 - 50% reduction in time requirements for processing redemptions through strategic redesign.

JPMorgan Chase Bank

Madison, WI

Multinational banking and financial services company.

Personal Banker

7/2010 to 7/2012

Assessed client banking and investment needs, proposed financial products / services, and acquired, retained, and deepened customer relationships. Generated operational cost savings by leading analysis of return on investment and resources during the branch's busiest period.

KEY ACHIEVEMENTS

- Provided steadiness during a period instability and turnover within the branch's management team.
 - Acted as Lead Banker and mentored Junior Bankers on company policies and procedures.
 - Maintained seamless business operations and fortified relationships with clients.
- Worked on a four-person team to strategically profile and identify client's needs.
 - Delivered a 16% year-over-year increase in total branch deposits and balances.

EDUCATION

Master of Business Administration (MBA), 2015

Loyola University Chicago – Quinlan School of Business, Chicago, IL

Bachelor of Science (BS) in Economics, 2009

University of Kansas, Lawrence, KS

- LICENSES & CERTIFICATIONS -

Series 7 and 63 (FINRA)

Chartered Financial Analyst (CFA), Level 1 Certification (Candidate)

- PROFESSIONAL AFFILIATIONS -

University Club of Chicago – Member

American Economic Association – Member