

LINDA LEE

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Manager, Financial Planning & Analysis (FP&A)

Expertise in streamlining financial reporting processes, generating revenue / expense forecasts, and conducting P&L performance analysis focused on driving strategic planning and optimizing financial performance.

History of preparing financial reports with variance analyses and business review presentations while creating financial models, managing the budgeting process, analyzing actual vs. planned expenditures, and overseeing month-end close activities. History of conducting financial analysis to identify cost-saving opportunities and enhance overall efficiency.

- Successful in leading process improvement initiatives, encompassing new technology integration, purchasing and invoice process automation, and cash flow visibility improvement.
- Notable background in managing the full scope of accounting operations, from accounts payable and receivable, purchase orders, journal entries, bank reconciliations, 401K, and payroll processing.
- Expertise in preparing a range of financial reports and developing dashboards to aid leadership with decision-making.

Core Competencies

Financial Planning & Analysis • Business Planning & Execution • Financial Reporting • Budgeting & Quarterly Forecasting
Planning & Reporting Systems • Financial Modelling • GAAP Compliance • Executive Reporting & Dashboard Creation
P&L Analysis • Variance Analysis • Process Improvement • Business Reviews • Financial Statement Analysis
Accounts Payable & Receivable • Headcount Reporting • Informed Decision-Making

Professional Experience

Brown Group, Irvine, CA

Jan 2017 – Current

FP&A Manager, Corporate FP&A; Jun 2021 - present

Offer dealer clients the industry-leading F&I voluntary protection products, reinsurance / dealer participation programs, anti-theft programs, and dealer-centric P&C / worker comp offerings.

Prepare a budget with \$130M in revenue and \$45M in EBITDA, monitor cost, analyze actual vs. planned expenditures, develop accurate quarterly forecasts and deliver detailed reports to senior leadership, highlighting financial performance and driving decision-making. Handle ad-hoc requests of executives by providing timely and effective responses. Drive accurate financial reporting by supporting the monthly closing process with the accounting teams.

- Expedited monthly financial closings by reducing turnaround time from 8 to 5 business days through on-time financial reviews and prompt issue resolution.
- Achieved a 30% decrease in time to prepare financial reports by streamlining processes using Sage Intacct.
- Enabled executives to make informed decisions by delivering comprehensive financial reports and presentations.

Sr. Financial Analyst, Corporate FP&A; Jan 2017 – Jun 2021

Calculated sales commissions for 22 district managers, ensuring on-time and accurate processing of compensations. Provided an overview of fiscal performance to senior leadership by delivering regular financial analysis reports.

- Ensured smooth execution of the budgeting process by developing / executing robust financial models.
- Drove five (5) days reduction in sales commission report preparation time by revamping the excel-based commission files and creating checklists.

Shady Creek Genomics, San Diego, CA

Jan 2019 – May 2023

Accounting Specialist (Contract 15- 20 hour per week – nights and weekends)

A pharmaceutical company offering probiotics and nutritional products to customers across U.S.

Managed end-to-end bookkeeping operations, from accounts payable and receivable, purchase orders, journal entries, bank reconciliations, 401(k), and payroll processing.

- Improved cashflow visibility by automating purchasing / invoicing processes through the execution of ProcureDesk.
- Accomplished an average accuracy rate of 95% by categorizing / recording financial transactions using QuickBooks.
- Achieved an average accuracy rate of 99% in processing accounts payable invoices, ensuring on-time vendor payments.
- Processed ~100 transactions monthly, ensuring accuracy and compliance with GAAP standards.
- Implemented cost-saving measures that resulted in annual savings of ~\$75K through streamlined reporting and budget analysis.

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The Best Software Software Inc., Foothill Ranch, CA

Jun 2013 – Dec 2016

Sr. Business System Analyst

Accelerant is a process-driven, full-service provider specializing in the life sciences and the high technology industry.

Achieved project-defined milestones and deliverables by fostering collaboration with internal and external stakeholders. Drove customer satisfaction and enhanced usability by conducting functional walkthroughs, executing User Acceptance Testing (UAT) sessions, and developing user manuals.

- Contributed to developing a reporting application using a cloud data warehouse, integrated from various sources, including AS400 and Omnitrac.
- Improved customer experience by facilitating project status meetings with end users and other stakeholders.

Irvine Title, Irvine, CA

Dec 2011 – Apr 2013

Sr. Financial Analyst

Service provider to mortgage and real estate industries, acquired by Brown in 2013.

Streamlined two (2) divisions' annual budgeting and forecasting processes while optimizing financial planning outcomes. Enabled senior leadership to maintain optimal staffing levels through headcount reporting and staffing bridge analysis.

- Enhanced decision-making and financial planning by providing daily metrics, weekly projections, monthly revenue / expense forecasts, and conducting financial reporting analysis.
- Played a key role in improving overall operational efficiency by conducting a monthly staffing bridge model analysis and delivering insights to executive management for data-driven decision-making.

Your Software Inc., Aliso Viejo, CA

Sep 2006 – Nov 2011

Financial Analyst • Hired as a Junior Financial Analyst

Your Software delivers cybersecurity, data performance, directory and identity, and modernization solutions.

Oversaw the NorthStar bookings revenue project in Siebel Analytics and OBIEE while implementing necessary changes and ensuring swift issue resolution in collaboration with the team. Drove improvements to the reporting infrastructure and processes based on financial metrics and business performance analysis. Provided accurate financial data for quarterly survey reporting to the Bureau of Economic Analysis, United States Department of Commerce.

- Enabled business leaders / managers to improve performance and decision-making by 40% through reporting.
- Worked with department managers to senior executives during the building and monitoring of budgets.
- Streamlined monthly bookings revenue publishing process that reduced turnaround time from 8 to 5 days.
- Drove 10% elevation in reporting accuracy by integrating a new tracking and management reporting system.
- Achieved a 50%+ increase in user adoption across multiple business departments for the business intelligence tool.

Education

Master of Business Administration (M.B.A.), Marketing and Finance, Loyola Marymount University, Westchester, CA

Bachelor of Arts (B.A.), Social Science and International Studies, University of California, Irvine, CA

Technical Skills

Essbase • Hyperion Planning • Siebel Analytics • Oracle Business Intelligence Enterprise Edition • Khalix • Microsoft 365
Salesforce.com • QuickBooks • ProcureDesk • Sage Intacct