

XXXXXXXX E. XXXX

Jackmans Main Road, XXXXXX, St Michael, XXXXXXXX, XXXXXX, XXXXX22

(XXXX) XXX-1700/ (XXX) 231-XXXX

XXXXXk@XXXXX.com / sXXXXX@cXXXXXrf.com

PROFILE SUMMARY

Accomplished and goal-oriented Executive, highly regarded for leadership and specialized excellence in all areas of Finance. Bringing forth leadership, drive, and extensive experience in investment management, policies and procedures development, project financial appraisal, financial analysis & interpretation, and business plan preparation & evaluation, in both the private and public sectors. Offering multifaceted expertise and a proven ability to revitalize organizations, initiate company-wide campaigns, and capture untapped growth opportunities. Exceptional analytical skills, with the ability to examine and understand business needs while exceeding stringent expectations. Adept at developing and implementing financial concepts for financial planning, forecasting, modeling, and internal controls. Out of the box, an intuitive thinker who espouses innovative ways to elevate organizational performance, utilizing the technical expertise and business acumen necessary to translate business requirements and targets.

CORE COMPETENCIES

- Proven experience building and leading an effective and cohesive financial division
- Knowledge and understanding of financial principles, regulations, and current trends
- Ability to mine data for insights to inform strategy and drive business optimization
- Strong expertise in and understanding of investment strategies and risk management
- Team Leader; excels at building relationships with internal and external stakeholders
- Strategic and creative thinking, with strong influencing and decision-making skills
- Skilled in guidance, problem-solving, and conflict resolution for smooth workflow
- Strong written and verbal communication skills for documentation and correspondence
- Solid interpersonal & organizational skills with the ability to prioritize and multi-task
- Excellent time management with high precision in a deadline-driven environment

SKILLS HIGHLIGHTS

Financial Administration	Financial Planning & Modelling	Financial Analysis & Control
Investment Strategies	Cash Flow Management	Capital Structure Evaluation
Risk Monitoring & Mitigation	Operations Management	Relationship Management
Audit & Control	Performance Optimization	Business Analysis & Strategy
Personnel Management	Training & Development	Team Building & Management
Coordination & Collaboration	Flexible & Dedicated	Self-motivation & Initiative

PROFESSIONAL EXPERIENCE

Managing Director and Principal Consultant | XXXXXXXX Limited.

2009 – Present

- Provide investment and financial services firm, specializing in investment and financial advisory services, risk management, pension investment analysis, business analysis and needs assessment primarily to SMEs, Non-Governmental Organizations (NGO), non-profits, Trustees, Social Security institutions and governments.
- Provide senior management with strategic advice and counsel on a variety of business issues, such as market trends, product positioning, and sales strategy.
- Prepare and implement comprehensive business plans to facilitate achievement by planning cost-effective operations and activities.
- Conducted market research on competitors' offerings and pricing strategies to develop competitive positioning statements for our product portfolio.

Accomplishments

- Created a business plan for each client including financial goals and monthly budgeting, increasing customer satisfaction ratings by 10%.
- Spearheaded efforts to improve internal processes, increasing productivity by 25%.

Vice President – Investments | XXXXXXXX Inc.

2005 – 2008

- Assumed responsibility for managing investment portfolios for the Life Insurance Company, Segregated Pension Funds, and Mutual Funds in Barbados, Trinidad, the Eastern Caribbean, the Netherlands Antilles, Belize, and Panama.
- Managed the investment department, including the recruitment and training of staff, implemented, upgraded and monitored systems and controls within the department and budget preparation.
- Represented the company on Joint Venture arrangements. Established and administered corporate objectives, marketing strategies and action plans of the department.
- Reviewed the company's investment policy, as well as developing investment strategies and reviewing and revising investment plans. Following appropriate approval, proposed and implemented strategic investment plans.

Accomplishments

- Designed and implemented a risk management framework that reduced portfolio volatility by 50%.

→ Collaborated with the management to develop/implement strategic plans for the portfolio, resulting in an increase of 30+%.

Manager, Investments | XXXXXXXX Office

2002 – 2005

- Oversaw the Investment Department of the Barbados National Insurance Board.
- Reviewed the Fund's Investment Policy and created an investment strategy, as well as reviewed and revised investment plans.
- Proposed and implemented strategic investment plans. Initiated, analyzed, and evaluated investment proposals.
- Developed criteria for selection and or evaluation of investments.

Accomplishments

- Involved in upscaling and downscaling project ideas to present to managers, increasing business efficiency by 5%.
- Monitored performance of all investments and advising management and the National Insurance Board on all matters pertaining to investment decisions. Represented the National Insurance Board on Joint Venture arrangements.

General Manager | XXXXXXXXXXXXXXXX Banking Corporation

1997 – 2002

- Responsible for providing strategic direction and leadership to a subsidiary company of CIBC West Indies Holdings Limited.
- Ensured that established business and financial plans of the company were achieved.
- Managed a diverse range of activities including strategic development, client relationship management, human resources, technology and operational capability, regulatory and compliance, publicity/marketing and business development.

Accomplishments

- Worked with management team to create new policies and procedures for the branch, increasing efficiency by 15%.
- Grew profitability of branch 18% during 2001 by controlling overtime and keeping fee rebates to a minimum.

Manager - Offshore Services | XXXXXXXXXXXXXXXX, Offshore Banking Unit

1995 – 1997

- Assumed responsibility for managing the operations of the Unit.
- Assisted in the establishment and administration of corporate objectives, marketing strategies, financial targets, and action plans of the Offshore Banking Unit.
- Identified new opportunities to promote the products and services of the Bank.
- Promoted the Bank, and maintained professional relationships between the Bank, clients and suppliers of services to the Bank.

Accomplishments

- Developed new client acquisition and retention strategies to increase revenue by 30%.
- Increased productivity of the team by 15% in six months, resulting in a 10% decrease in customer complaints.

ADDITIONAL EXPERIENCE

Vice President – Investments | XXXXXXXXXXXXXXXX Corporation

1992 – 1995

Financial Analyst | XXXXXXXXXXXXXXXX & Casualty Reinsurance Corporation

1990 – 1992

Audit Assistant | XXXXXXXXXXXXXXXX

1987 – 1990

EDUCATION

Bachelor of Science Degree, major Computer Science | University of the West Indies

PROFESSIONAL DEVELOPMENT

- Certified Management Consultant (CMC) – **2011**
- Certified General Accountants (CGA) Association of Canada – **1992**
- Pension Funds and Investment Management Program, Wharton Executive Education, The Wharton School, University of Pennsylvania, Philadelphia, Pennsylvania – **June 2004**
- The Centre for the Development of Enterprise (CDE) Diagnostic Software Tool developed by the Latin American Foundation for Sustainable Development (Fundación para el Desarrollo Sostenible en América Latina) FUNDES to conduct enterprise evaluation and diagnostic reviews of Small and Medium Sized Enterprises (SMEs) in the CARIFORUM region – **February 2009**
- Business Mentorship Cave Hill School of Business, University of the West Indies – **October 2012 & June 2013**
- Various seminars, workshops and conferences covering accounting, anti-money laundering, change management, credit analysis, due diligence, human resource management, international marketing, international financial services, investment management, real estate, pensions and strategic planning – Canada, United States, United Kingdom and the Caribbean.

MEMBERSHIPS, DIRECTORSHIPS, AFFILIATIONS AND PROFESSIONAL DEVELOPMENT

- Member/Past President, Certified General Accountants' Association of Barbados
- Member/Past Chairman, Finance Committee, Girl Guides Association of Barbados
- Member/Former Treasurer Caribbean Institute Certified Management Consultants (CICMC)
- Member Barbados Diocesan Trustees and Member/Chairman Diocesan Pension Board
- Member Parochial Church Council St. Cyprian Anglican Church
- Former Commissioner Fair Trading Commission of Barbados
- Temporary Lecturer on Alternative Investments (Hedge Funds, Private Equity, Real Estate, Managed Futures), Graduate Programme, University of the West Indies (UWI), Cave Hill Campus, 2012-2013, 2013-2014, 2014-2015, 2015-2016 and 2016-2017
- Temporary Lecturer, Financial Markets and Institutions, Undergraduate Programme, UWI, Cave Hill – Summer School 2013-2014, 2014-2015 and 2015-2016 and Managing Financial Institutions, Semester 2 2016-2017