

# Heather Rodak

Finance Officer

## Profile

Results-driven Finance Officer with 5 years of experience in managing financial operations, streamlining processes, and driving cost savings. Adept at financial analysis, budget management, and ensuring regulatory compliance. Demonstrated success in developing strategic financial plans and collaborating with cross-functional teams to achieve organizational goals. Strong interpersonal and communication skills with a proactive approach to problem-solving.

## Employment History

### Finance Officer at Morgan Stanley, MS

Feb 2023 - Present

- Successfully managed a \$500 million client portfolio, consistently achieving annual returns of 15% and contributing to a 20% increase in the firm's overall assets under management.
- Streamlined financial reporting processes, reducing time spent on monthly and quarterly reports by 30% while increasing accuracy and compliance with regulatory requirements.
- Identified and implemented cost-saving measures that resulted in a 25% reduction in operating expenses, contributing to a 10% increase in net profit margin for the fiscal year.
- Led a team of 10 finance professionals to successfully complete a complex \$200 million acquisition, resulting in a 15% increase in market share and positioning Morgan Stanley as a leading player in the industry.

### Assistant Finance Officer at Goldman Sachs, MS

Sep 2018 - Jan 2023

- Developed and implemented a new budget forecasting model, resulting in a 15% increase in forecast accuracy and enabling the firm to make better-informed financial decisions.
- Streamlined financial reporting processes by automating data extraction and analysis, reducing manual workload by 35% and improving report accuracy by 20%.
- Identified and executed cost-saving initiatives across multiple departments, leading to a 10% reduction in operational expenses, equating to \$2 million in annual savings.
- Successfully managed a \$50 million investment portfolio, consistently outperforming benchmarks and generating an average annual return of 8% over a five-year period.

## Education

### Bachelor of Science in Finance at University of Mississippi, MS

Sep 2014 - May 2018

Relevant Coursework: Financial Accounting, Corporate Finance, Investment Analysis, Financial Risk Management, Portfolio Management, Financial Markets and Institutions, Business Statistics, Micro and Macro Economics, and Financial Modeling.

## Details

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## Links

[linkedin.com/in/heatherrodak](https://www.linkedin.com/in/heatherrodak)

## Skills

QuickBooks

Excel

Financial Analysis

Budgeting

Forecasting

Risk Management

SAP

## Languages

English

Portuguese

## Hobbies

Investing in stocks and bonds

Reading financial literature and books

Attending financial seminars and workshops