

Akasha
Bartosek

Financial Planning
Analyst

Profile

Employment History

Education

Details

akasha.bartosek@gmail.com
(304) 884-9470
123 Maple Street, Omaha, NE 68102

Dedicated Financial Planning Analyst with 1 year of experience in analyzing financial data, preparing reports, and providing strategic recommendations to optimize financial performance. Proficient in financial modeling, forecasting, and budgeting, with a strong attention to detail and excellent communication skills. A proactive problem solver committed to driving growth and improving financial processes.

Financial Planning Analyst at Ameritas Financial Services, NE

May 2023 - Present

- Successfully implemented a comprehensive financial planning model that increased revenue by 25%, resulting in an additional \$1.5 million for Ameritas Financial Services in NE.
- Streamlined the budgeting and forecasting process, reducing time spent by 40% and increasing accuracy by 15%, leading to more informed and timely decision-making.
- Identified and executed cost-saving initiatives, such as renegotiating vendor contracts and optimizing resource allocation, which led to an annual savings of \$500,000.
- Developed and presented impactful financial reports to senior management, contributing to a 10% increase in efficiency in strategic planning and decision-making.

Associate Financial Planning Analyst at Renaissance Financial, NE

Aug 2022 - Mar 2023

- Developed and implemented a comprehensive financial planning strategy for 50 clients, resulting in an average portfolio growth of 20% over a two-year period.
- Streamlined the financial planning process by creating customized templates and automating data analysis, leading to a 30% reduction in time spent on plan preparations and a 15% increase in client satisfaction ratings.
- Successfully managed a \$10 million investment portfolio, conducting in-depth market research and risk analysis, which contributed to a consistent annual return of 8% for clients.

Bachelor of Science in Finance and Financial Planning at
University of Nebraska-Lincoln, NE

Sep 2018 - May 2022

Relevant Coursework: Financial Accounting, Managerial Accounting, Corporate Finance, Investments, Financial Planning, Risk Management,