

William Scott

Sunnyvale, CA

william543_53k@indeedemail.com

(510) 693-9105

#readytowork

Work Experience

Financial Analyst

Kaiser Permanente (contract via Rose Intl.) - Pleasanton, CA

September 2019 to Present

- * Application Life Cycle Management (ALM) - IT Finance point of contact for all Kaiser organizations. Primary duties include software application (SBAR) review and YTD spend tracking (~\$90M).
- * Investment - IT Finance Business Case Discipline (BCD) data consolidation for all national and regional projects requiring CFO-and-higher-level approval. Primary duties include database management, creation of various Project Savings and Watchlist reports for FP&A, and screening of BCDs for accuracy. Tools: VBA macros and Access database.

FP&A Analyst

BorderX Lab - Sunnyvale, CA

June 2019 to August 2019

Created and managed company forecast, logistics channel analysis, and key financial metrics dashboards. Tools: Metabase and Superset, using SQL.

Financial Analyst, Vistage Worldwide

contract via VACO - San Diego, CA

December 2018 to April 2019

- * Created and delivered monthly reports for metrics, financials, forecast, and budget, covering all aspects of the business (workbooks totaling more than 70MB in size, 3 board-facing ppts, and a database of all finances and metrics).
- * Trained incoming employees in Bi360, Tableau, Salesforce, and Vistage reporting processes.

M&A Analyst

Fleetridge Pacific - San Diego, CA

August 2017 to September 2018

Supported experienced brokers with all aspects of sell-side market transactions (deals ranging from \$2M to \$50M in total value), including sourcing and on-boarding clients, producing CIMS, and creating models for company valuations. Industries of focus: home health and hospice.

Summer Legal Intern

Rimon Law - Palo Alto, CA

June 2017 to August 2017

Law Review Work Study

University of San Diego - San Diego, CA

August 2016 to May 2017

Litigation Support Analyst

Transperfect LS - San Francisco, CA
April 2015 to September 2015

Business Analyst

Xerox - San Francisco, CA
November 2014 to February 2015

- * Monitored all metrics across all the Bay Area toll bridges, comprising account usage, weekly mail/email volume, and website usage reports, including several million accounts (4.5GB workbook).
- * Ad-hoc analyses on user accounts' data, discovering areas needing improvement for our development team.

Financial Analyst

Wells Fargo - San Francisco, CA
July 2014 to November 2014

Maintained small business and private customer deposits (\$0-\$20 million-sized) forecasts.

Financial Analyst Intern, bSafe

Bipper - Palo Alto, CA
January 2014 to July 2014

Managed all office finances: purchases, budgets, forecasts, and fund allocations (~\$1.5M).

Law Office Intern

King and Capital Law - Beijing, CN
June 2013 to August 2013

NASA Inspire Intern

Edwards Airforce Base - Edwards, CA
June 2008 to August 2008

LANGUAGE & TECHNICAL SKILLS

Education

MBA and Masters in Finance (Dual Degree)

University of San Diego
May 2019

Political Science, Chinese, German (Triple Degree)

UC Berkeley
December 2013

Skills

- Excel
- Tableau

- Financial Analysis
- Chinese
- Forecasting
- Visual Basic
- SQL

Links

<http://www.linkedin.com/in/williamhscott>