

JESSICA ROBERTS

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A Senior Director with 10+ years of experience within the corporate finance industry, specializing in FP&A, GAAP, strategy development, and finance leadership. A proven track record of defining long-term financial strategies for enterprise companies. A strong background in leading cross-functional teams to refine financial reporting and enhance data driven decision making.

EDUCATION

MASTER OF SCIENCE (M.S.), FINANCE

Boston University, Boston, MA
May 2009 - May 2011

BACHELOR OF SCIENCE (M.S.), FINANCE

Boston University, Boston, MA
September 2005 - May 2009

KEY SKILLS

- Financial Planning & Analysis (FP&A)
- Corporate Finance
- Investment Strategy
- ROI Analysis
- Organizational Leadership
- Financial Reporting

CERTIFICATIONS

- Chartered Financial Analyst (CFA), April 2011
- Chartered Alternative Investment Analyst (CAIA), April 2011

PROFESSIONAL EXPERIENCE

FINANCE DIRECTOR

Harlan Mutual Investment Firm,
Boston, MA
May 2016 – Present

- Manage all functions of corporate finance for a leading investment firm with \$2B in assets under management (AUM), lead FP&A activities, and analyze ROI for potential investment opportunities based on market trends and economic indicators
- Lead a team of 25+ finance managers, analysts, and accountants to execute financial reporting, ensure compliance with GAAP regulations, and monitor fiscal performance
- Coordinate with the Chief Financial Officer, VP of Finance, and C-level executives to develop an annual operating budget valued at more than \$100M

DIRECTOR OF FINANCE

Amherst Investments Inc.,
Amherst, MA
May 2011 – May 2016

- Led all aspects of FP&A for a prominent investment firm with \$300M in AUM, which included developing business models and forecasting revenue to support data-driven decision making for short-term and long-term investment strategies
- Oversaw a 20-person finance team to develop analytic tools, conduct financial reporting, and identify process improvement opportunities to enhance finance operations
- Delivered reports to the Head of Finance, CFO, and CEO on financial performance and provided recommendations to drive growth across various market verticals