

# JOHN BERGSEN

A Senior Financial Analyst with 10+ years of experience specializing in investment management, FP&A, portfolio management, and financial reporting. A strong history of analyzing financial performance of multi-million-dollar investment portfolios.

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## PROFESSIONAL EXPERIENCE

### SENIOR FINANCIAL ANALYST

Rowan Investments Inc., Boston, MA  
October 2016 – Present

- Design and implement reporting tools for enterprise business functions and investment management, create dashboards, and implement forecasting tools to enhance business transparency and drive data-driven decision-making
- Coordinate with C-level executives to review financial data and portfolio performance and define investment strategies based on financial forecasts and trends
- Lead transformation projects to centralize financial reporting for the integration of large acquisitions valued at \$30M-\$100M

### SENIOR FINANCIAL ANALYST

Centerline Investing, Boston, MA  
June 2011 – October 2016

- Led a team of five financial analysts to manage reporting activities for an investment portfolio valued at \$55M, which included identifying opportunities to enhance forecasting and improve data-driven decision making for investment strategies
- Oversaw all aspects of financial operations, including modeling, strategic planning, portfolio management, and cash flow analysis

## EDUCATION

### BACHELOR OF SCIENCE (B.S.) FINANCE

Boston College, Boston, MA  
September 2007 - June 2011

## KEY SKILLS

- Financial Planning & Analysis (FP&A)
- Investment Management
- Financial Reporting
- Financial Modeling
- Strategic Planning

## CERTIFICATIONS

- Chartered Financial Analyst (CFA®), 2012