

ERDENE ERDENEBILEG, CMA

Sr Financial Analyst | Full-Cycle FP&A: Forecasting, Analytics & Accounting | Financial Process Optimization | SQL & Automation
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Financial analyst with 10+ years executing FP&A, budgeting, forecasting, variance analysis, and accounting across insurance, technology and trading organizations. Specialized in automating and optimizing financial processes with SQL, VBA, and modeling to build scalable, single-source-of-truth reporting that drives executive decision-making. Skilled at extracting and manipulating complex data sets in SQL and Amazon Redshift and partnering with technical and non-technical teams. Delivers high-impact projects with ownership in fast-changing, ambiguous environments. CMA and CFA Level II candidate.

Technical skills: SQL, Amazon Redshift, Advanced Excel, VBA, Power BI, TM1/Cognos, Hyperion/Essbase, Oracle, SAP, Clearwater

Data visualization: Tableau, Power BI, MS Excel data visualizations, MS Visio, R, Heatmaps, Adobe Analytics

Planning and Analysis: Full-cycle FP&A, Budgeting, Forecasting, Month-end close, Financial reporting, Financial modeling, Variance & KPI analysis

Analysis: Process automation & optimization, SQL data extraction, Data reconciliation, Single-source-of-truth reporting, Pricing, Reengineering

Soft skills: Ownership & accountability, Cross-functional collaboration, Problem solver, Thrives in ambiguity and rapid change

PROFESSIONAL EXPERIENCE

Financial Reporting Analyst • Nov 2020 – Present • Symetra Financial Corporation, Remote

- Automated derivatives journal entries and amortization in Clearwater, fully eliminating a recurring 3-day manual process.
- Led all phases of a regulatory reporting initiative for new Iowa investment-code compliance—translating statutory changes into reporting, building audit-ready documentation, and implementing the process with senior leadership.
- Replaced 3 days of manual Excel compliance work with a real-time Clearwater dashboard.
- Cut income-audit reconciliation from 4 hours to under 10 minutes with a redesigned, formula-driven data flow.
- Authored quarterly investment disclosures (MD&A, IMR/AVR, fair-value roll-forwards) under GAAP and STAT, cutting prep time from 6 hours to 2 with formula-driven templates.
- Volunteered to interview candidates and serve as an onboarding buddy, cross-training staff and streamlining cross-team processes.
- Refined total-company investment yield analysis and rebuilt legacy reporting workbooks into formula-driven templates and a consistent source of truth.

Tools used: Hyperion/SmartView/Essbase, ClearWater, Bloomberg, Advanced Excel, Power BI

Financial Analyst • Apr 2019 – May 2020 • Amazon Web Services (AWS), Seattle, WA

- Wrote SQL against Amazon Redshift to extract and manipulate complex data sets for marketing performance metrics and funding decisions.
- Resolved budget baselines tied to inter-team fund transfers, keeping forecasts and actuals aligned with business teams.
- Reconciled data across Oracle, Budget Force, TM1, and Redshift into a consistent source of truth across platforms.
- Built bottom-up annual budgets, forecasts, and reallocations with business teams at a multinational technology company.
- Automated monthly budget and team-performance reporting with VBA, cutting process time from 3 hours to 30 minutes.

Tools used: TM1/Cognos, SQL, Amazon Redshift, DataNet, Budget Force, Adobe Analytics, VBA, Advanced Excel

Senior Financial Analyst • Jul 2010 – Jan 2018 • APU Trading LLC, Ulaanbaatar, Mongolia

- Owned end-to-end budgeting, forecasting, and cost control across production and logistics, with break-even analysis.
- Supported an \$81M syndicated loan from EBRD and Credit Suisse, including the extended repayment schedule.
- Modeled \$300K of synergy from logistics integration in the APU & MBC merger.
- Built executive dashboards reporting sales, profit trends, and competitor benchmarks to senior leadership and the Board.

Tools used: Financial Modeling in MS Excel, MS PowerPoint, Tableau, INDEX, MATCH, SUMIFS, Conditional lists

EDUCATION

Master of Science in Project Management

University of Cumberlands • Williamsburg, Kentucky • 2021 – 2023

MBA in SAP Finance and Accounting

Maharishi International University • Fairfield, Iowa • 2018 – 2021 • GPA 3.88

BBA in Financial Management (Graduated with honors)

Mongolian University of Science and Technology • Ulaanbaatar, Mongolia • 2006 – 2010 • GPA 3.65

Interests: Active options trader managing a personal portfolio.