

Bailey Bluejay

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PROFESSIONAL SUMMARY

An achievement-focused professional with over 10 years of experience in financial analysis, portfolio management, and process optimization, now transitioning into human resources. Recently completed an MBA with a focus on organizational development and HR strategy. Eager to leverage financial acumen and team development expertise to contribute to HR functions, with a focus on enhancing organizational culture and talent management. Highlighted skills include:

- Financial analysis & reporting
- Organizational development & HR strategy
- Process improvement & workflow optimization
- Cross-functional collaboration
- Team leadership & training
- Strategic planning & forecasting
- Data management & systems implementation
- Regulatory compliance
- Change management & transition leadership
- Advanced Power BI and Excel

EXPERIENCE

HIGH SIERRA ENERGY, Omaha, Nebraska

Financial Analyst

20XX – Present

- Onboarded and trained 5 new hires to ensure familiarity with proprietary software and company culture and standards resulting in 100% retention at 90 days
- Managed transition to new back-office software, developing scalable processes and interactive trainings to ensure data integrity and team-wide adoption
- Analyzed over 50+ crude oil and natural gasoline contracts annually, identifying pricing discrepancies and optimizing terms, contributing to savings of up to \$250k in procurement costs
- Monitored and analyzed monthly trucking expenses exceeding \$2M, using Excel and Power BI to identify cost-saving opportunities, improving profitability by 12%
- Designed and maintained cross-functional Excel databases with advanced formulas and macros, streamlining reporting for 5+ departments and reducing data retrieval time by 40%

CHARLES SCHWAB, Omaha, Nebraska

Portfolio Accountant

20XX – 20XX

- Accurately calculated weekly Net Asset Values for 30+ Unitized Managed Accounts and Collective Investment Funds totaling over \$500M in assets, ensuring compliance with regulatory and client standards
- Developed and streamlined 10+ procedural documents, standardizing departmental workflows and reducing training time for new analysts by 30%
- Built Excel workbooks to track price changes and portfolio allocation

New Accounts / Options Principal – Trading Desk

20XX – 20XX

- Reviewed and approved 100+ new account, margin, and option trading applications monthly, ensuring compliance with AML and Patriot Act regulations, reducing compliance risk
- Executed complex equity and options orders of \$5M for high value clients

EDUCATION

CREIGHTON UNIVERSITY – HEIDER COLLEGE OF BUSINESS, Omaha, Nebraska

Master of Business Administration, Concentration in Leadership

May 20XX

GPA: 3.5

UNIVERSITY OF NEBRASKA - OMAHA, Omaha, Nebraska

Bachelor of Science in Finance, Minor: Spanish

May 20XX

GPA: 3.88

VOLUNTEER ACTIVITIES

Trustee, Omaha Association - Downtown Omaha community planning and development organization

Volunteer, Boys and Girls Club of Omaha