

# Timothy York

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## SUMMARY

Senior finance operations analyst with nine years supporting **commercial real estate services**, portfolio delivery, and client-facing business operations. Work centers on forecasting, monthly close, journal entry support, **capital expenditure validation**, staffing reporting, revenue and expense variance analysis, and management presentations. Advanced Excel capability includes Power Query, pivot tables, lookups, structured models, and reconciliation controls, supported by strong Microsoft Word and PowerPoint skills. Coordinated UAT, process transitions, user training, and reporting improvements across Finance Managers, operations leaders, project teams, and client stakeholders. Translates detailed financial activity into clear decisions while protecting accurate treatment of reimbursable and **non-reimbursable spend**. Ready to help Northstar Property Services strengthen PDS Finance reporting, close execution, process transitions, and **data-driven decisions**.

## EXPERIENCE

### Sr. Finance Operations Analyst

March 2022 - Present

Summit Workplace Advisors

*Minneapolis, MN*

Direct monthly **finance operations** across 18 client locations, consolidating revenue, expense, staffing, and capital activity for Finance Manager review. Lead reporting model development, close support, UAT, training, cost-code validation, and process improvement for workplace services operations.

- Consolidated revenue, expense, staffing, and capital activity across 18 client locations for **Finance Manager** review.
- Connected billing, staffing, and general ledger extracts through Excel Power Query models and **pivot tables**.
- Investigated furniture, equipment, and labor variances with operations leads before monthly management discussions.
- Validated cost centers, project codes, and capex coding before **reimbursable spend** entered close.
- Coordinated UAT, defect resolution, and job-aid training for 30 finance and operations users.
- Prepared PowerPoint presentations, close schedules, **journal entry support**, and **reporting** controls for Finance Managers.

### Finance Analyst

January 2020 - February 2022

Lakeshore Commercial Services

*Eden Prairie, MN*

Managed recurring financial reporting for commercial property service contracts, connecting **monthly close**, revenue, operating expenses, pass-through costs, staffing requirements, and client review materials. Supported Finance Managers with reconciliations, forecasting inputs, retail furniture closeout, and analyst onboarding.

- Reconciled monthly **revenue**, operating **expenses**, purchase orders, and client-approved pass-through costs.
- Traced **journal entry support** from source transactions through invoices, approvals, and contract documentation.
- Built Excel variance templates separating timing, volume, coding, and scope explanations for forecast updates.
- Matched invoices, receiving records, project codes, and capitalization documents across 11 active retail sites.
- Resolved missing hours and assignment changes with project managers before **staffing reporting** deadlines.
- Produced Word and **PowerPoint** review materials while documenting procedures for newly assigned analysts.

### Financial Analyst

June 2018 - December 2019

Blue Oak Realty Operations

*Bloomington, MN*

Supported finance administration for a regional **real estate services** group, maintaining schedules for contract revenue, operating expenses, capital requests, vendor commitments, budget comparisons, and monthly close. Partnered with property teams and Finance Managers on coding, variance explanations, and reporting consistency.

- Maintained schedules for contract revenue, operating expenses, capital requests, and vendor commitments.
- Reconciled general ledger activity with operational reports before finalizing **monthly close** packages.
- Consolidated property and project trackers through Excel formulas, pivot tables, and data validation.
- Researched budget and forecast **variances** with property teams for **Finance Manager** approval.
- Checked capex **cost codes**, authorization records, vendor documents, and capitalization treatment.
- Created **Word** close checklists and reference guides for analysts supporting client accounts.

### Finance Coordinator

September 2017 - May 2018

Cedar Point Property Management

*Maplewood, MN*

Maintained transaction and reporting schedules for a property management finance team while completing a Finance degree. Built practical experience across invoice support, reconciliations, budget review, journal entry preparation, operating and capital classification, and deadline-driven reporting.

- Maintained transaction schedules and **reporting** files for property management finance reviews.
- Prepared invoice logs, payment support, and account reconciliation files for **monthly close**.
- Compared budget and actual spending, then routed documentation questions to property managers.
- Updated Excel trackers for vendor commitments, tenant charges, and reimbursable expenses.
- Organized source materials for journal entries and operating expenditure classification.
- Produced recurring Word reports and PowerPoint exhibits for internal **finance** meetings.

PROJECTS

Workplace Finance Reporting Model 📅 2024

Partnered with Finance Managers and operations leads on a shared reporting model that connected billing, staffing, general ledger, and capital activity. Power Query and pivot tables gave stakeholders one clearer monthly view for decisions.

Staffing Workflow Transition 📅 2023

Worked alongside finance and operations users during a staffing management transition. UAT scripts, defect follow-up, training, and job aids helped 30 users adopt a consistent reporting workflow.

LEADERSHIP & AWARDS

- Finance Department Academic Achievement Award, University of Wisconsin–La Crosse, 2017
- Dean’s List, University of Wisconsin–La Crosse, Fall 2016 and Spring 2017
- Finance Club Peer Mentor, University of Wisconsin–La Crosse, 2016–2017

EDUCATION

Bachelor's Degree in Finance

University of Wisconsin–La Crosse GPA: 0

2017

La Crosse, WI

*Coursework: Financial accounting, corporate finance, investments, business analytics*

CERTIFICATIONS

- Microsoft Office Specialist: Excel Expert 📅 2023
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TECHNICAL SKILLS

- **Financial Analysis:** Forecasting, variance analysis, financial reporting
- **Month-End Close:** Journal entries, close schedules, account reconciliations
- **Capital Expenditures:** Capex validation, cost codes, capitalization treatment
- **Real Estate Finance:** Commercial real estate, property services, retail furniture
- **Microsoft Excel:** Power Query, pivot tables, lookup formulas
- **Microsoft Office:** Excel, Word, PowerPoint
- **Reporting Systems:** General ledger extracts, staffing reports, project trackers
- **User Acceptance Testing:** UAT, test cases, defect resolution
- **Process Enablement:** Process transitions, user training, job aids
- **Presentation Tools:** PowerPoint, financial presentations, management reviews
- **Reconciliation Controls:** Source tracing, invoice matching, documentation review
- **Planning Methods:** Budget review, plan-to-actual, forecast updates

SKILLS

- |                         |                        |                       |                           |
|-------------------------|------------------------|-----------------------|---------------------------|
| • Financial analysis    | • Variance analysis    | • Staffing reporting  | • Process improvement     |
| • Forecasting           | • Real estate services | • UAT                 | • Microsoft Excel         |
| • Monthly close         | • Capex validation     | • Process transitions | • Financial presentations |
| • Journal entry support | • Cost-code review     | • User training       |                           |

PROFESSIONAL AFFILIATIONS

- Student Budget Committee Representative, College of Business Administration, 2016–2017
- Finance Club Peer Mentor, University of Wisconsin–La Crosse, 2016–2017

LANGUAGES

- English (Native)
- Spanish (Beginner)

**ADDITIONAL INFORMATION**

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**Work Status** : Authorized to work in United States. No sponsorship required.

**REFERENCES**

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AVAILABLE ON REQUEST