

# Christopher G. Lapate

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## Financial Planner

### Budgeting/Planning ▪ Revenue Analysis ▪ Leadership

- Astute, highly skilled finance specialist with 10 years of advancing experience in critical areas of financial analysis, budgeting, and business intelligence.
- Superior record of focusing on creating accurate business analytics and timely reports aligned with company needs and company's financial status.
- Highly motivated individual with a strong work ethic and exceptional problem-solving ability, concentrated on achieving company goals.

### Business Value Offered

- Adaptable, Genuine Team Player
- Superior Interpersonal/Communication Skills – Oral and Written
- Resourceful/Innovative
- Computer Proficient – MS Office, PAM for Investments, and Bloomberg
- Detail Oriented
- Cost/Benefit Analysis
- Financial Models
- Financial Planning
- Investment Management
- Investment Accounting
- Profit/Loss Analysis
- Return on Assets (ROA)
- Return on Investment (ROI)
- Operating Budgets

## Career Narrative

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*Mutual of America Financial Group*, New York, NY ▪ Aug. 2011–Present

*Promoted through a series of increasingly responsible roles based on superior performance.*

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### Second Vice President, Financial Planning and Analysis ▪ May 2021–Present

Review and analyze revenue and expense data related to parent company and subsidiaries including premiums, fee income, operating expenses, capital expenses, investment income, and profit margin.

Collaborate with managers across company to assign budgets aligned with department needs and financial well-being of company.

- Revamped major portion of financial analyses provided to senior leadership to provide clearer picture of company's financial strength
- Confirmed financial integrity and accuracy of ledger entries by managing daily operations of FP&A division and collaborating with other departments.
- Created efficiencies and developed analytics needed to achieve financial goals and reporting needs.

### Manager, Financial Planning and Analysis ▪ Mar. 2019–May 2021

Managed staff and assisted with preparation and analysis of monthly, quarterly, and annual revenue plans and forecasts including fee-based income, reserve required interest, and other revenue-generating business models.

- Successfully implemented new budgeting software (Oracle Planning) with advancement into Oracle cloud.
- Developed and maintained expert knowledge and uses of business intelligence solutions.
- Developed ability to assume complex analyses by building confidence dealing with business issues and acquiring knowledge of more in-depth tasks.

**Investment Accounting Manager** ▪ May 2015–Mar. 2019

Oversaw investment accounting team and all related functions calculating highest level of precision for net assets values of an array of portfolios under management.

Conducted high-level control reviews ensuring all daily activities were properly accounted for.

- Key player implementing of new budgeting/planning tool; led outsourcing group identifying vendors of investment accounting. Graded and selected vendor, Brown Brothers Harriman, and executed delivery of outsourcing.
- Significantly reduced risk associated with pricing mutual funds and reduced cost through salaries/benefits savings.
- Streamlined processes and enhanced workflow by close collaboration with CFO, treasurer, and senior executives.
- Upgraded investment software by leading a firmwide implementation project.
- Ensured company was adequately serviced in all aspects of investment accounting by careful management of relationships with service providers.

**Mutual Fund Accounting Supervisor** ▪ Sept. 2013–May 2015

Maintained and reconciled multiple mutual fund and private client portfolios, pricing equity and debt securities, money market instruments, and options/futures through PAM accounting software.

- Ensured daily activities related to calculation of fund net asset values were completed accurately and in timely fashion.

**Mutual Fund Accountant** ▪ Aug. 2011–Sept. 2013

Liaised between custodian banks and brokers to ensure timely settlement of trades and proper handling of corporate actions.

- Performed critical reconciliations of portfolio holdings, cash balances, and daily trade activity.

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**ICON International**, Stamford, CT ▪ Apr. 2009–Aug. 2011

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**National Broadcast Associate** ▪ May 2010–Aug. 2011

Handled client requests, media advertisement allocations, program descriptions, and log times.

- Prepared client media pre/post buy analysis and reports.

**Billing Specialist** ▪ Apr. 2009–May 2010

Coordinated billing process for national and local broadcasts with accounting department.

- Reviewed credit submissions, cash/trade conversions, reversals, and other billing adjustments.

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**Education**

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**B.S. – Finance**, St. John’s University – Tobin College, Queens, NY, May 2008.

GPA 3.5, Major GPA 3.7

Business Honors: **Student Intern** in *Executive in Residence* Program.

Worked with R.R. Donnelly, Weiser LLP, Sugar Foods Corp., and Momma’s House to assist with strategic issues.

- Assisted in formulation of strategic plan for R.R. Donnelly’s middle market account expansion.
- Developed strategies for implementing best practices at Weiser LLP for attracting and retaining staff.