

# Jeff Nelson

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## PROFESSIONAL PROFILE

Self-motivated and driven professional with over 10 years of management experience. Passionate about continuous learning and self-improvement, with a deep interest in a finance, investment strategies, and computer programming. Skilled in advanced Excel for financial modeling and analysis, and proficient in Python for data automation and optimization. Strong analytical skills, with hands-on experience in portfolio management, financial reporting, and budgeting. Proven ability to analyze financial trends, prepare detailed reports, and deliver actionable insights to support business decisions. Eager to bring a growth-oriented mindset to a finance role, leveraging academic knowledge, financial models, and leadership skills to drive results.

## EDUCATION

**Bachelor of Science: Finance** - *Western Governors University* | Salt Lake City, UT

October 2024

Capstone Project: Financial Assessment, Cash Budget and Capital Budget of Company XYZ

- Conducted comprehensive financial analysis, assessing liquidity, profitability, and leverage ratios
- Developed comprehensive cash budgets, forecasted inflows/outflows, and optimized equipment investment timing
- Evaluated capital investments using NPV, optimized financing, and recommended optimal capital allocation

**Key Courses:** Enterprise Risk Management, Financial Management, Corporate Finance, Financial Statement Analysis, Quantitative Analysis, Innovation in Finance, Operations and Supply Chain Management, Project Management

## EXPERIENCE

**Financial Strategist** – *The Miliare Group* | Nashville, TN

Mar. 2024 – Present

- Boost client investment returns by 15% through data-driven asset allocation, adding \$1M to retirement savings
- Provide customized life insurance plan that meet clients' unique financial planning needs, improving satisfaction
- Create financial planning strategies to free over \$100K in client cash flow for reinvestment, improving portfolio growth
- Develop financial models for expense management and risk mitigation, securing long-term fiscal health
- Conduct risk assessments and optimize portfolios, ensuring more secure and stable retirement outcomes

**Bartender** – *Skylight Bar* | Franklin, TN

Apr. 2023 – Mar. 2024

- Developed scheduling and tip-tracking spreadsheet, improving efficiency and transparency
- Drove a 250% increase in sales by improving service, optimizing operations, and enhancing the cocktail menu
- Managed daily cash handling and end-of-shift reconciliation, ensuring accuracy in revenue tracking

**Manager/Bartender** – *Neighbors Bar and Grill* | Franklin, TN

Feb. 2022 – Apr. 2023

- Led critical initiatives for the successful launch, driving growth into a multi-million-dollar establishment
- Established strong relationships with regular clientele, fostering customer loyalty and increasing repeat business
- Managed all cash handling and server checkouts as a keyholder, ensuring financial accuracy and accountability
- Delivered results through effective communication and leadership of bar staff

**General Manager** – *John A's Restaurant* | Nashville, TN

Aug. 2020 – Jan. 2022

- Led complete bar renovation, resulting in a 700% sales increase by managing staffing, ordering, & financial operations
- Organized weekly high-profile events increasing additional revenue by 200% while enhancing brand visibility
- Negotiated with supply vendors to secure favorable pricing, reducing operational costs and improving margins
- Created operating procedures (SOPs) and trained all staff, improving operational efficiency and consistency
- Oversaw monthly P&L reports, analyzing financial performance, and making data-driven decisions
- Developed the bar's point-of-sales (POS) systems, streamlining transactions and improving financial tracking
- Designed and implemented a robust inventory and sales management system involving spreadsheets and macros

**Lead Bartender/Venue Bartender** – *Top Golf* | Nashville, TN

Sept. 2017 – Sept. 2022

- Managed bar operations for a multi-million-dollar concert venue, generating over \$20,000 in revenue per show
- Oversaw a team of 30 bartenders during large events, ensuring operational efficiency in events over 1000+ people
- Supported senior leaders in a \$10 million revenue establishment by providing key metrics and performance insights

## LICENSES & QUALIFICATIONS

- Advanced Financial Modeling (Excel), Data Analysis (Power BI), Data Cleaning (Python, SQL)
- Related Skills: Life and Health Insurance License; Programming; MS Office 365: Word, Access, PowerPoint, Outlook