

DANA NEUMAN

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KEY ACHIEVEMENTS

- ★ **Financial Management & Assets Managed:** Oversaw global distribution of **\$140MM in perishable commodities**, allocated **\$30MM into investment products** and managed a **\$4MM inventory asset account**, optimizing liquidity.
- ★ **Entrepreneurial Revenue Growth:** Scaled a service business to **\$362K in revenue**, acquiring **188 clients (80% referrals)** while achieving a **62% gross margin** through strategic pricing and cost controls.
- ★ **Process Automation & Financial Efficiency:** Designed and streamlined financial workflows using **Adobe, Excel, DocuSign, Google Drive, and QuickBooks**, improving operational efficiency across 10+ years in systems strategy.

EDUCATION & AFFILIATIONS

Master of Science in Applied Data Science

Expected **May 2027**

University of San Diego Shiley-Marcos School of Engineering

- Courses: Business Data Science, Predictive Modeling, Time Series, Statistics, Data Mining, Cloud Computing

Bachelor of Science in Business Administration

May 2025

San Diego State University Fowler College of Business

- Affiliations: Finance & Investment Society, Artificial Intelligence Club
- Major Projects: Project management consulting for systems design; EV strategy proposal to board of directors
- Courses: Finance, Managerial Accounting, Investments, Systems Analysis, Strategic Management, Global Business

Associate of Science in Business Administration

Aug 2021

Associate of Art & Science in General Studies

Jun 2018

TRAINING, CERTIFICATIONS, & PROFESSIONAL DEVELOPMENT

Level 1 Chartered Financial Analyst Exam

Nov 2025

Chartered Financial Analyst (CFA) Institute

- Training: Alternative Investments, Corporate Issuers, Derivatives, Economics, Ethics & Professional Standards, Financial Statement Analysis, Fixed Income, Portfolio Management, Quantitative Methods

Business Intelligence & Data Analyst Certification

Mar 2024

Corporate Finance Institute

- Training: Power BI, Power Query, Python, SQL, & Tableau, Regression Analysis, DAX & Time Intelligence

Financial Modeling & Valuation Analyst Certification

Dec 2023

Corporate Finance Institute

- Training: 3-Statement Modeling, Valuation, Budgeting & Forecasting, DCF, Scenario & Sensitivity Analysis

Securities Industry Essentials (SIE)

Dec 2022

Financial Industry Regulatory Authority

- Training: Capital Markets, Product Risks, Regulatory Framework, Trading, Ethics, Account Types

PROFESSIONAL HIGHLIGHTS

Self-Employed Revenue Management

Uber Platform

Oct 2022 – Present

San Diego, CA

- Manage Uber business operations, optimizing revenue through route planning, cost control, and top-rated service.

Inventory & Data Management Analyst (Seasonal)

Hood River Cherry Company – Vertically Integrated Farming Operation

Mar 2015 – Sep 2024

Hood River, OR

- Data Analytics & Inventory Optimization:
 - Built **Excel inventory dashboards** to track **100+ pallet movements/day**, ensuring revenue and cost allocation.
 - Oversaw **\$700K/day in outbound shipments**, ensuring **FOB compliance** and mitigating financial risks.
 - Introduced **Poka-Yoke methodology** to enhance **financial report accuracy** and cost-revenue allocation.
- Team Communication and Process Management:
 - Led collaborative planning with **6 forklift operators**, optimizing inventory preservation and efficient distribution.

Sales Administrator & Finance Manager

Cal Pacific Truck Center LLC – Commercial Vehicle Sales, Parts, and Service Dealership

Oct 2021 – Oct 2022

San Diego, CA

- Finance & Insurance Strategy, Loan Structuring & Risk Management:
 - Negotiated **loan terms**, cutting client **interest rates by 200 basis points** and increasing conversion rates.
- Excel Analytics, Forecast Modeling & Operational Planning:
 - **Built Excel financial models for annual planning, sales forecasts, KPI dashboards, and variance reports.**
 - Improved **cost of sales analysis with Excel-driven charts & meters, enhancing financial reporting clarity.**
- Financial Accounting & Statement Management:
 - Reconciled **AR/AP ledgers** and assisted in **month-end closing** to ensure financial statement accuracy.
 - Partnered with leadership to **analyze trends and identify cost optimization opportunities in monthly reviews.**

Financial Operations Associate

Copley Financial Group INC – Retirement and Tax Planning

Sep 2019 – Jan 2021

San Diego, CA

- Asset Management and Budget Allocation:
 - Processed and monitored **\$30MM+ in client investment assets**, ensuring **regulatory compliance** and managing **timely transfers** across IRAs, annuities, and brokerage accounts.
- Operational Efficiency & Digital Transformation:
 - **Digitized financial agreements**, automating **50% of manual workflows** and improving turnaround time.
- Budget Strategy & Financial Optimization:
 - Developed a **budget model for a \$400K+ marketing fund**, optimizing **client acquisition costs** and **ROI.**

Owner & Financial Manager

New Moon Cleaning (Sole Proprietorship) – Residential and Vacation Home Organic Cleaning Service Hood River, OR

Jan 2014 – Dec 2017

- Financial Management & Strategic Planning:
 - Directed **forecasting, budgeting, tax prep, and QuickBooks-based reporting**, driving profitability.
 - **Managed \$362K revenue, achieving a 62% gross margin through pricing strategy & expense control.**
 - Developed a **scalable business model**, leveraging **performance-based incentives** for efficiency.
- Team Development, Leadership, and Trainer:
 - Trained **4 full-time employees**, implementing an **incentivized pay structure**, increasing **daily sales by \$560.**

TECHNOLOGY SKILLS & DISCIPLINES

- **Financial Modeling & Analytics:** Budgeting, Forecasting, 3-Statement Models, Statistics, Probability
- **Financial Statements & Accounting:** P&L, Cash Flow, Balance Sheet, GAAP, Accruals, Reasoning, Judgement
- **Microsoft Office & Tools:** Excel, Word, PowerPoint, Outlook, Teams, Zoom, SQL, Power BI
- **Behavioral & Leadership Skills:** Initiative, Communication, Collaboration, Social Awareness, Relationships, Agility