

# Nicholas A. Sagan

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## SUMMARY:

Financial planning & analysis (FP&A) professional with strong experience in a financial role with management experience and business intelligence skills. Strengths include leadership, advanced Excel skills, programming with Python, and creating dashboards on multiple platforms. Core technical competencies include Microsoft Office, PowerBI, SharePoint, Python, VBA, SQL, and HTML.

## EDUCATION:

### **PENN STATE ERIE, THE BEHREND COLLEGE**

*Graduated May 2016*

- Accounting, Bachelor of Science
- Applied Economics, Minor

### **UNIVERSITY OF SOUTH FLORIDA**

*Completed May 2022*

- Business Analytics, Graduate Certificate

## PROFESSIONAL EXPERIENCE:

### **FANATICS WHOLESALE COMMERCE**

*Tampa, FL*

#### ***Senior Financial Analyst (October 2023 – Present)***

- Coordinate and consolidate the working capital and cash flow annual operating plan as well as rolling monthly forecasts to provide early visibility of changes, risks and opportunities to the Director of FP&A and Wholesale CFO in a concise and effective manner.
- Review financial results, develop summaries and analysis of segment and consolidated results with a focus on key metrics and trends.
- Prepare and distribute monthly working capital and cash flow reporting package, including key performance indicator analysis and commentary.
- Identify and implement process improvement and automation opportunities to increase productivity that optimizes data efficiency and quality.
- Responsible for developing a budget and forecasting model for working capital items.
- Prepare presentation materials for leadership including monthly actuals and forecast reporting.

### **PINELLAS SUNCOAST TRANSIT AUTHORITY (PSTA)**

*St Petersburg, FL*

#### ***Manager of FP&A (April 2022 – October 2023)***

- Supervises professional staff including the Budget Analyst(s).
- Train staff on advanced technical skills such as Excel macros, Python, and PowerBI.
- Plans and coordinates division activities including the annual development of the Authority's budget, budget presentation and legal publications, notices, and documents.
- Prepares and publishes technical instruction for the annual budget including timetables as provided by law, development of all required forms, and expectations of the budgetary process including all processes and provisions as it relates to Truth in Millage.
- Reviews the status of budget to actual data, conducts analysis, and partners with departments to determine underlying root causes of variances, and develop recovery plans.
- Performs quantitative analysis for strategic financial planning including multiyear forecasts.
- Prepares a detailed analysis monthly of all revenue and expenses to assist with examining and analyzing historical trends as well as tracking actual costs to budget amounts.
- Presents on budget related items for PSTA Board of Directors meetings and public hearings.
- Implements and continually updates current business processes in the Finance division.
- Utilizes PowerBI to create dashboards with direct connections to the agency's ERP system, the reports are published to SharePoint where department heads can visually see how their costs compare to budget.
- Ensures compliance with the governmental accounting, auditing, and financial reporting procedures as they apply to all applicable laws, rules, and regulations.

**Budget Analyst** (*July 2020 – April 2022*)

- Prepare the annual preliminary, tentative, and final budgets, summarized in a budget book.
- Utilize technical skills to automate tasks with Python, VBA code, and advanced Excel functions.
- Assist divisions and departments with preparing budget requests and justifications.
- Calculate budgeted salaries and fringe benefits for all Authority employees.
- Prepare and regularly update the Five-Year Capital Improvement Program, that includes projects with a major presence in Pinellas County such as the SunRunner and electric buses.
- Prepare financial reports monthly, quarterly, and at year-end, ensuring accuracy, completeness, and timeliness of financial information.

**CDR MAGUIRE***Pittsburgh, PA***Fiscal Analyst** (*March 2018 – July 2020*)

- Worked directly with a senior level team of project managers to provide contracted project management services to the City of Pittsburgh and Allegheny County for federally funded and state funded transportation projects.
- On a weekly basis met with the customer's core staff to get updates on the status of design and construction tasks, tracking lead time by party to update performance metrics.
- Ensured that federal and state agreements met the most current budgets on projects.
- When budgets exceed previously referenced agreements, began an amendment process and the required coordination to avoid delaying project milestones.
- Assisted the customers in preparing their annual budget process by forecasting potential design and construction costs related to their projects.
- Accompanied clients to meetings with PennDOT to take meeting minutes and provide updates on construction projects until projects were in the closeout phase.
- Processed and tracked requests for federal and state reimbursements for Allegheny County.
- Created a data center that connects and automates multiple Excel spreadsheets with the implementation of Python's openpyxl library.
- Maintain records of contracts, reports, and financial information on Microsoft SharePoint
- Provide miscellaneous administrative tasks related to accounting and financing when needed.

**SCOTTIES BUILDING SERVICES***Raleigh, NC***Billing Coordinator** (*October 2016 – January 2018*)

- Worked with sales representatives from different divisions to maintain accounts receivable.
- Accurately generated invoices detailing services rendered, then directed these to customers.
- Communicated with different departments within the company to ensure that the customer billing notes within our ERP system were complete and up to date.
- Compiled a list of past due invoices by customer and age on a weekly basis.
- Followed up with appropriate contacts to ensure that we could collect payment from customers for the completed work related to past due invoices.
- Deposited checks remotely and reconciled the totals to internal postings on a daily basis.
- Submitted comprehensive reports detailing the weekly sales, accounts receivable, and collections efforts to the corporate officers at the end of the week.