

# ALEX HELLER

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## Financial Analyst

Recent graduate with a Finance/Marketing degree, exceptional analytical skills, and the desire to join an organization in a finance, data, or business analyst capacity. Recognized throughout career for an extremely accountable, coachable work style—in addition to a high degree of resourcefulness and the ability to work independently on projects to ensure completion by key deadlines. Strong proficiency in MS Excel, combined with extensive study of modern financial modeling, forecasting, and statistical analysis techniques. Additional strengths in sales, marketing, and customer service—including completion of an internship focused on helping a company research potential new markets, expansion opportunities, and customer profitability rates.

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### KEY SKILLS & QUALIFICATIONS

Financial Modeling & Analysis	Advanced Spreadsheet Design	Sales & Marketing Support
Strategic Decision Support	Business Case Development & Analysis	Superior Math & Statistics Skills
Cost/Benefit Analysis	Market Research / Trend Analysis	Account Profitability Analysis
Business Planning & Expansion	Report Writing & Presentation Delivery	Cross-Functional Collaboration

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### PROFESSIONAL EXPERIENCE

BALLAST POINT BREWING COMPANY | **Tasting Room Associate** *San Diego, CA: Sep 2021 - Present*

- Demonstrate products and ensure a highly positive guest experience for this award-winning craft brewery
- Anticipate guest needs, answer questions, coordinate food/drink orders, and process customer payments
- Assist in opening/closing the facility and preparing the tasting area for operation the next day

BH GOLD INSURANCE AGENCY | **Finance Internship** *San Diego, CA: Jun 2018 - Aug 2020*

- Gained experience with a variety of financial analysis, business strategy, and decision-making scenarios
- Developed cost/benefit analyses to help management assess potential expansion into 43 individual states
- Calculated both initial and recurring costs of expansion, including licensing costs and tax implications
- Built a new financial modeling approach to assess the profitability of each client in the firm's portfolio
- Eliminated over \$1.2M in annual losses by identifying/recommending removal of unprofitable accounts
- Ran ad hoc reports and created graphical representations of all nationwide policies/accounts via zip code
- Led implementation of a special "Was the Grass Greener" program to win-back desirable prior clients
- Developed cross-selling prospect lists for insurance agents via AMS exports and Query+ software usage
- Worked on data verification project to ensure accuracy of GeoVera & Coastal Select dwelling coverage
- Additionally created/distributed social media posts to publicize corporate, community and charity events

CALIFORNIA STATE REFEREE COMMITTEE | **Soccer Referee** *San Diego, CA: Feb 2013 - Aug 2018*

- Gained confidence, teamwork, decision-making, and leadership skills through years of soccer officiating
- Effectively managed game situations and defused potential conflicts with players, coaches, and parents
- Reported game scores, tracked player infractions, ensured field safety, and addressed medical incidents

PICNIC PEOPLE EVENT PLANNING COMPANY | **Event Team Member** *San Diego, CA: Jun 2016 - Aug 2017*

- Coordinated planning, logistics, and event management functions for groups of up to 500 guests
- Worked under extremely fast-paced timelines, ensuring strict adherence to food safety regulations
- Provided superior customer service and resolved any complaints or disputes in diplomatic fashion

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### EDUCATIONAL CREDENTIALS

**Bachelor of Business Administration, Finance & Marketing** | Gonzaga University (2021)

*Dussault Merit Scholarship Recipient; Key coursework included financial reporting, financial analysis, portfolio management, investment analysis, financial management, accounting, economics, math/statistics, and strategic management*

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### SOFTWARE / TECHNOLOGY PROFICIENCY

**Software Proficiency** | MS Office (including Advanced MS Excel – Pivot Tables, Macros, vLookups, Conditional Formatting, etc.), Google Suite, Tableau, Power BI, Query+, AMS, Zoom Web Conferencing