

Aftab Ahmed

Ellicott City, Maryland 21043



Professional Summary

Results-driven finance and strategy professional with 10+ years of experience across FP&A, strategic planning, financial modeling, budgeting, profitability analysis, and executive reporting. Strong track record supporting public, private, and private equity-backed organizations through dashboard development, ERP transformation, and data-driven decision support. Advanced user of Excel, Power BI, NetSuite, and MS Dynamics, with a history of improving reporting speed, forecasting accuracy, operational efficiency, and margin performance.

Core Competencies

- Financial Modeling & Forecasting
- Budgeting & Long-Range Planning
- Strategic Finance & FP&A
- Profitability & Margin Analysis
- Variance, Scenario & KPI Analysis
- Capital Investment Evaluation
- Private Equity Reporting
- M&A and Post-Acquisition Integration
- Power BI Dashboard Development
- Advanced Excel, PivotTables, VBA
- NetSuite and MS Dynamics
- Data Validation and Migration
- Financial Process Automation
- Executive Reporting
- SOX and FERC Compliance

- Cross-Functional Business Partnership

Professional Experience

Think Consulting - T. Rowe Price

Fund Accounting / Finance Consultant | Feb 2026-Present

- Deliver accurate and timely close support for fund super sheets in a fast-paced investment environment.
- Investigate and reconcile transaction activity against estimated values, resolving exceptions and maintaining fund integrity.
- Lead process optimization initiatives for bank reconciliations, reducing manual touchpoints and improving workflow effectiveness.
- Created an automated NAV pricing calculator that improved pricing accuracy, standardized valuation procedures, and reduced processing time.

AEA Investors / Window Nation Inc.

Senior Strategy Analyst | Jul 2024-May 2025

- Spearheaded enterprise strategic planning processes that aligned corporate goals with market trends and contributed to a 15% increase in operational efficiency.
- Designed executive dashboards in Power BI and Excel to track KPIs, improving data visibility and accelerating decision-making by 30%.
- Conducted competitive and macroeconomic analysis that informed market entry strategy and improved forecasting accuracy by 20%.
- Partnered with leadership and cross-functional stakeholders to gain buy-in and execute high-impact growth and optimization initiatives.

Stride Inc.

Finance Manager | Apr 2022-Jul 2024

- Managed financial operations for six public charter schools, ensuring compliance with federal and municipal reporting requirements.

- Developed and implemented a five-year profitability roadmap that strengthened long-range budget forecasting.
- Built dynamic financial models to support daily operations and strategic planning across multi-site educational programs.
- Designed a product margin calculator that optimized pricing strategy and increased blended sales margins.

Tactic Consultancy

Management / Finance Consultant | Jan 2019-Mar 2022

- Designed a private equity-compliant financial model and five-year profitability plan to support investor presentations and long-term planning for Hudson Global Scholars.
- Led monthly executive financial reviews, translating forecasts and actuals into actionable insights for C-suite leadership at Exelon Utilities and Hudson Global Scholars.
- Partnered with sales and product teams to create margin analysis tools that improved bundled pricing and increased gross margins by more than 12%.
- Integrated MS Dynamics financial data into Power BI for Pearson Education, improving reporting speed and cross-functional visibility by 40%.
- Transitioned legacy Excel financial models into automated Power BI dashboards for Exelon Utilities, reducing manual reporting time by 40%.
- Ensured compliance with FERC accounting standards and project governance protocols, supporting audits and internal controls for nine utilities.
- Oversaw budgeting, forecasting, and financial operations during rapid growth, helping scale revenue by more than 35% while maintaining cost efficiency.

McCormick & Company

Finance Manager | Aug 2017-Dec 2018

- Automated month-end close processes, reducing reporting time by 30% through financial models and workflow improvements.
- Led detailed P&L variance analysis across commodities, plant operations, and product mix, identifying \$1.2M in cost-saving opportunities.

- Partnered cross-functionally to streamline reporting and improve forecast accuracy by 25%.
- Built tools to monitor spend performance across production units, increasing budget compliance by 18%.

Becton Dickinson (BD)

Senior Financial Analyst | Jan 2014-Jul 2017

- Developed valuation models and licensing agreement analyses to support multi-million-dollar strategic initiatives and M&A activity.
- Led SOX internal audits and integrated two acquired entities into BD's corporate structure, ensuring compliance and continuity.
- Directed forecasting, budgeting, and performance tracking for the Women's Health product line.
- Managed post-acquisition financials, including earn-outs and payout structures, to optimize deal value and streamline integration.

Jos. A. Bank

Senior Financial Analyst | Aug 2012-Dec 2013

- Managed annual budgeting and forecasting for 25 departments in support of the company's five-year strategic plan.
- Developed real estate pro forma models and ROI analyses for new store leases, supporting expansion decisions across multiple markets.
- Performed monthly variance analysis at store and department levels to identify cost-saving opportunities and performance gaps.
- Prepared quarterly financial presentations for executive leadership and board meetings.

SafeNet (Gemalto)

Financial Analyst | Jul 2011-Jul 2012

- Managed the annual budgeting process for the marketing department, overseeing more than \$5M in planned expenditures.
- Conducted monthly variance analysis and recommended corrective actions that improved budget accuracy by 15%.

- Developed recurring financial reports that helped leadership evaluate campaign ROI and reallocate resources effectively.
- Collaborated with cross-functional teams to streamline reporting workflows and reduce the monthly close cycle by 20%.

Stanley Black & Decker / Mercantile Bank & Trust

Credit Analyst | Aug 2006-Jun 2011

- Conducted credit risk assessments and underwrote commercial loans exceeding \$80M across diverse industries.
- Developed forecasting models that improved cash flow projections by 25% and supported stronger credit decisions.
- Streamlined financial statement analysis and credit review processes, cutting approval turnaround time by 15% to 20%.
- Collaborated on risk mitigation strategies that contributed to a 10% year-over-year reduction in loan loss provisions.

Education

University of Chicago | Graduate Certificate, Data Engineering (Candidate) | Expected Oct 2025

Focus: database systems, SQL, data pipelines, dashboards, and analytics.

Harvard University | Graduate Certificate, International Relations / Security | Dec 2024

University of Maryland, Robert H. Smith School of Business | MBA, Finance and Entrepreneurship | Dec 2015

Independent study: 3D printing and future market impact.

Capstone project: Process mapping of open-heart surgery, University of Maryland School of Medicine.

University of Maryland Global Campus | Graduate Certificate, Accounting | Dec 2015

Coursework included fraud examination and IT audit.

University of Maryland, College Park | Bachelor of Arts, Economics | Dec 2005

Certifications

- Certified Information Systems Auditor (CISA)