

# Albert Martinez

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## Education

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### University of Miami, Herbert School of Business

*Doctorate of Philosophy, Economics*

*Master of Science, Accounting*

Miami, FL

May 2028

### Southern Methodist University, Cox School of Business

*Master of Science, Finance*

### University of South Florida, Muma College of Business

*Bachelor of Science, Accounting*

- Summa Cum Laude
- Cumulative GPA: 3.90/4.00
- Dean's List Awarded in all semesters. Graduated in three years.

## Experience

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### Pacific Investments and Capital Group

*Principal*

Miami, FL

Jul 2021 – Jun 2022

- Facilitated the purchase of 4 properties in Miami for development worth (\$8mm). Personally, selected the 4 investment properties, procured financing, and helped with all aspects of closings for all properties.
- Procured construction financing for 3 projects without builder's experience totaling (\$6mm)
- Worked alongside architects to develop plans for ground-up luxury properties focused on the Belle Meade neighborhood of Miami
- Responsible for complete oversight of all aspects of home buying process and home development process

### Treehouse Miami

*Interim Finance Director*

Miami, FL

Jul 2021 – June 2022

- Led complete restructuring effort in finance and operations for business grossing \$5MM in revenue. Increased net profit margins 183%; from 6% to 17% within the first 90 days.
- Partnered with business operations to develop a detailed Annual Financial Plan, modeling multiple scenarios for differing cost structures in addition to detailed monthly, quarterly, and annual reporting.
- Provided Finance support to business operations by monitoring and communicating performance against forecast, spending and adjustments.
- Reduced operating expenses by 15% by negotiating and refining vendor contracts for volume discounts, endorsement deals and other financial incentives.
- Audited reports and invoices leading to the discovery of significant fraud, developed interim and standing internal controls; Partnered with Legal and helped recover a majority of all embezzled funds.
- Completely restructured and reconciled all financial statements. Reclassified all misclassifications and developed reporting guidelines for management.
- Calculated the daily breakeven figure and identified a constant trend of sales below the breakeven for Thursdays and Sundays. Improved operating profit by 10% by discontinuing operations on those days of the week.
- Developed an employee benefits package to improve employee morale and increase the companies competitiveness in the labor market; it included a 401k plan with company match and vacation days.

### Flextronics

*Cost Accountant*

Dallas, TX

Jun 2021 – Dec 2021

- Manage and support strategic planning of the fixed asset process for entire site totaling \$52m
- Conduct financial analysis, including profit margin variance, to report to senior management
- Ensure compliance with GAAP through internal audits

- Identify and implement cost savings and waste reduction projects to improve financial performance
- Assist in completion of the monthly close process by the preparation of journal entries as well as review of reconciliations
- Support business unit performance analysis and assist with ad-hoc reporting to support strategic initiatives

## **BayCare Health Systems**

Clearwater, FL

*Finance Technician III.*

Nov 2019 – Aug 2020

- **Financial Accounting and Reporting Division**
  - Improved operational efficiency of assigned financial processes by 40% through the implementation of streamlined data management procedures.
  - Partnered with management in preparing the annual budget by maintaining and analyzing the rolling forecast to ensure consistency.
  - Reconciled cash logs daily, reviewed general ledger at month-end to find variances and discrepancies from bank statements, posted journal entries for weekly fiscal deposits and monthly FICA taxes.
  - Maintained and consolidated quarterly asset depreciation and amortization schedules for prepaid assets
  - Streamlined multiple process improvements by restructuring excel templates and integrating macros created in VBA with PowerShell scripts that automatically imported updated data.
- **Tax Division**
  - Prepared tangible property tax returns for \$2.23 billion dollars of company PP&E
  - Amended 2019 tax returns for all associated entities to reflect changes in the tax code regarding fringe benefit deductions.
- **Fixed Assets and Liabilities Division**
  - Collaborated on \$1.25 billion bond issuance request by researching and delivering documentation.

## **Student Employment & Extracurricular Activities**

### **Southern Methodist University Nancy Chambers Underwood Graduate Investment Fund**

Dallas, TX

*Graduate Practicum Analyst*

Aug 2020 – Dec 2020

- One of 20 students selected to participate in the highly competitive Nancy Chambers Underwood Graduate Investment Fund, the fund currently has a portfolio worth about \$6 Million and is one of the oldest student managed funds in the country.
- Worked in 5-person team responsible for making allocation decisions for the largest portion of the portfolio, fixed income portion of the portfolio, which is worth around \$2 million.
- Controlled allocation decisions for the energy sector portion of the portfolio worth around \$120,000

### **University of South Florida, Knack**

Tampa, FL

*Accounting and Finance Tutor*

Aug 2019 – May 2020

- Provided comprehensive one-on-one and group tutoring sessions to undergraduate students studying accounting and finance.
- Developed customized lesson plans to address individual student needs, focusing on improving understanding of financial concepts and enhancing problem-solving skills.
- Received consistently positive feedback from students, with an average rating of 4.8/5 for clarity, patience, and ability to simplify complex topics.

### **Barry University**

Miami, FL

*Resident Assistant*

Dec 2017 – May 2018

- Developed engaging programming initiatives for 200+ residents.
- Assisted in planning and executing community-building events. Collaborated on campus-wide events and diversity initiatives.
- Enforced policies, mediated conflicts, and ensured safety. Actively participated in training and professional development.
- Responded to emergencies and coordinated resources. Completed administrative tasks, including incident reports.

**Barry University**

Miami, FL

*Student Assistant, Center for Student Involvement*

Aug 2017 – May 2018

- Provided exceptional customer service by appropriately answering student concerns, forwarding messages, and confirming appointments as necessary.
- Assist with the organization of promotions and events.
- Conducted full front office reception duties and operated multi-line telephone system.

**Barry University**

Miami, FL

*Board Member, Men Achieving Leadership Excellence and Success Club*

Aug 2017 – May 2018

- Generating programs that benefit the entire student body and produce positivity.
- Giving back to Barry and the surrounding communities through community service activities.
- Created programs to boost self-esteem on campus.

**SKILLS**

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- **Skills:** Microsoft Office (Excel, PowerPoint, Word), SQL, VBA, Tableau, Lawson, Java, Essbase, T-Recs
- **Language:** Fluent in English and Spanish
- **Interests:** Assembling computers, Monetary policy, Biking, Swimming