Bernie Billesbach

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As a Client relations and software development professional, developed an extensive background in client relations support; on boarding new clients, managing support teams while tracking and reporting product defects; enhancing and developing new software products. Experienced providing on-site client training and leading regular operations and strategic planning meetings; developing and maintaining corporate finance budget and quarterly forecasts; as well as analyzing client contracts and managing client billing.

Skills and Expertise

- Customer Relations	- Project Management	- NVISION
- Financial Analysis	- Waterfall Dev Mgmt	- IBM/TSO
- Budgeting/Reforecasts	- Business Analysis	- PeopleSoft Financial
- Client Billing	- SDLC	- Microsoft EXCEL
- Onboarding/Implementation	- Process Improvement	- Hyperion
- Pricing/Contracts/Modeling	- Six Sigma Yellow Belt	- SQL/DB2

Professional Experience

DST Systems, Inc. /SS&C Technologies (Sep 1984 to Jun 2018)

Senior Financial Analyst Professional
Dec 2015 – Jun 2018

- DST Systems, Inc. is a leading provider of strategic advisory, transformative technologies, and operations outsourcing to the financial and healthcare industries.
- Managed the production of all monthly close reports and quarterly earnings information; budgeted and forecasted revenue and expenses for all clients associated with the retirement business segment of DST Systems representing $131M in annual revenue.
- Also analyzed client contracts, prepared proforma and pricing models, and managed all client billing and invoicing for the retirement segment of DST.
- Monitored, tested, and developed new Sarbanes and Oxley annual controls.
- Managed as credit analyst, all collections of outstanding accounts receivables.
- Experienced using PeopleSoft Financial, Hyperion, nVISION, and advanced MS EXCEL.

Client Relations Manager
Jul 1991 – Nov 2015

- Comprehensive experience in leading cross-functional teams for a multi-national company in a global workplace, including all aspects of client relationship management, corporate finance, business and financial data analytics, software development and risk analysis, change management, associate training, resource planning, budgeting and client billing, and business support within the Mutual Fund and Retirement industries.
- Labeled a "go to person" and subject matter expert on our retirement functionality, reporting, and contract billing and called upon regularly by our president of retirement and other senior officers to validate critical information.
- Managed simultaneous projects using in-house and vendor resources. Demonstrated a high degree of success managing multiple external and internal client's business support and development requirements and objectives while maintaining a high level of client satisfaction.

Business Unit Manager
Dec 1988 – Jun 1991

- Managed and led team responsible for yearend tax reporting production for three major business financial service segments and provided client support for division for clients utilizing DST System's mutual fund platform.

Supervisor - Operations and Corporate Actions
Sep 1984 – Nov 1988

- Built corporate actions department from the ground up and managed mutual fund dividend calculations, commission processing, proxy mailings and tabulations, sales reporting, dividend adjustments, and 1099, 5498, and W2P tax reporting and all department administration and staffing.

Footlocker (Sep 1982 to Jul 1984)
Store Manager, Cedar Rapids, IA

- Managed store and led team with store sales of $400,000 and received first year rookie manager inventory audit award

Education

BS in Business Administration, Management/University of Central Missouri/May 1982

References

Will be furnished upon request.