

# Matthew M. Lugar

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## Qualification Statement

I am seeking a position in corporate finance or a related field that would take advantage of my strong business, finance, and technical background and provide me additional opportunities to expand my knowledge and experience base.

## Relevant Experience

### **Allied Financial and Consulting Services**

1999-Present

#### *Business Analyst, Business Consulting Division*

- Instrumental in the planning, development, and creation of the Business Consulting division within the company along with the President and Managing Director. After a full year, company revenues improved substantially due in large part to the initial success of the Consulting Division.
- Developed short and long-term financial models and forecasts for small businesses and start-up level companies.
- Lead manager involved with business plan development, analysis, and implementation on all consulting projects.
- Responsible for managing all stages of projects and coordinating activities with outside consultants and other individuals involved in the projects.

#### *Operations Manager, Wealth Management Division*

- Highly involved in many aspects of the investment decision-making process, using various internal software and web-based management tools.
- Managed and prepared detailed reports on client asset portfolios.
- Implemented new software for database management, portfolio reporting, and billing.
- Maintained Windows NT network and twelve workstations.
- Assisted five brokers/planners as necessary with research, business development, and client financial planning using software such as Allocation Master, Portax, and Ibbotson Allocation Software.

### **Azusa Pacific University, Accelerated Degree Program and Undergraduate School of Business**

2001-Present

#### *Assistant Professor-Managerial Economics, Strategy and Planning*

- Assisted adjunct professor with all aspects of teaching in the areas of Managerial Economics and Strategic Planning including class presentations and discussions, syllabus and class development, research, and recruitment of guest speakers.
- Presentations and Lectures included the following:
  - o Investments and Personal Finance on an Economic Level
  - o Budgeting and Corporate Strategy
  - o The Six Sigma Process
  - o Mergers and Acquisitions: Their use in Corporate Strategy
  - o Strategy for the Small Business
  - o Writing a Successful Business Plan

### **Azusa Pacific University, Board of Trustees**

2000

#### *Research Analyst (Consulting Project)*

- Contracted by Finance Committee to research various issues related to the financial aspects of the University.
- Identified potential financial risk and suggested possible solutions to current problems with the under-funded university endowment using basic financial forecasting and modeling.
- Responsible for gathering data on budgetary issues and alumni donations.
- Reported directly to head of Finance Committee; organized and presented findings that affected the investment policy of the endowment and the budget.

Additional work experience provided upon request.

## Education

### **Azusa Pacific University**

**Bachelor of Arts: Business Administration (emphasis in Finance)**

May 2000

### **UCLA-Extension**

**Post-Undergrad Finance and Business Courses**

Current

- o Advanced Financial Statement Analysis
- o Corporate Budgeting and Financial Planning
- o Advanced Managerial Finance
- o Workflow and Process Control
- o Project Management

## Computer Skills

**Advanced Knowledge:** All MS-Office software, Windows and OS (Mac) operating systems, all web browsing tools (IE and Netscape), MS-Outlook, MS-Project, Norton Antivirus, McAfee Virusscan, pcAnywhere, Quicken, Quickbooks, Adobe Acrobat, ACT!, Client Data Systems, Morningstar, Weisenberger Suite, Centerpiece Portfolio Management, EZ Money Financial Planner, Allocation Master, Naviplan

**Working Knowledge:** Photoshop, Pagemaker, Basic HTML, File Maker Pro, MS-Access, Advanced Business Valuation 6, Crystal Ball Financial Forecaster, Portax, TimeValue, basic NT skills, basic network administration skills