

JOAQUIN SERRANO SOASTI

FINANCIAL ANALYST |

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PROFESSIONAL SUMMARY

Financial analyst and Georgia Tech Evening MBA candidate with experience building automated financial reporting, portfolio and workforce analytics, and reconciliation controls in Workday, Excel, Tableau, and Power BI. Combines budget, grant, salary, financial statement, and present-value analysis with cross-functional training and executive-facing decision support. Seeking to apply disciplined modeling and data-driven strategy to energy finance, investment banking, FP&A, treasury, infrastructure, valuation, and capital allocation.

EDUCATION

Georgia Institute of Technology — Scheller College of BusinessAtlanta, GA

Master of Business Administration, Evening MBA Program

2026–Present | Expected [2028]

Georgia State UniversityAtlanta, GA

Bachelor of Business Administration, Finance | Portfolio Management GroupMay 2024

PROFESSIONAL EXPERIENCE

Georgia Institute of TechnologyAtlanta, GA

Financial Analyst, School of Biological SciencesSep 2025–Present

- Lead financial reporting solutions for budget management, workforce planning, portfolio analysis, and leadership decision-making, integrating Workday, Excel, Tableau, and Power BI.
- Designed BioSci 360 V2.0, a parameter-driven reporting system consolidating six source inputs into portfolio, salary, gift, state, and sponsored-funding views of budgets, actuals, commitments, obligations, and balances.
- Built standardized data layers, automated downstream views, scheduled refreshes, reusable filters, and export outputs to reduce manual collection and repetitive table-by-table reporting.
- Established reconciliation and validation workflows across actuals, commitments, obligations, budgets, and balances; investigated timing variances and coordinated user testing before broader adoption.
- Developed salary and headcount analysis by employee, assignee, pay group, month, effort allocation, worktag, and funding source to support workforce, forecast, and portfolio discussions.
- Trained finance staff on report workflows, filters, refreshes, validation, and portfolio-specific use; created documentation and recorded walkthroughs to support knowledge transfer.
- Serve as lead mentor for a rotational development program with six participants annually; supervise one participant during a six-week department rotation and organize and collaborate on projects with each participant.

Financial Analyst IJun 2024–Sep 2025

- Developed present-value lease amortization schedules for real-estate portfolios valued in the hundreds of millions and spanning decades-long payment schedules.
- Contributed to Georgia Tech's 2024 Annual Financial Report through principal and interest entries, review checklists, and financial ratios including Primary Reserve, Viability, and Debt to Total Revenues.
- Supported Grants & Contracts post-award management and 2 CFR 200 compliance through effort reporting, expense and grant reconciliation, funding-stream variance analysis, and ledger adjustments.
- Partnered with the Controller's Office, Budget Office, and academic units to improve open-purchase-order tracking, financial dashboards, closeout visibility, and process documentation.

BusinessolverRemote, GA

Bilingual Member Service RepresentativeSep 2021–Jun 2024

- Analyzed and reconciled HSA, FSA, tuition assistance, dependent-care, and retirement-benefit accounts while applying varied plan policies and legal requirements.
- Administered direct billing and resolved complex, cross-functional account issues in partnership with internal operations teams and external agencies.
- Explained regulated benefits and financial documents in English and Spanish, including COBRA, SBC, SPD, retirement, coverage coordination, and tax documentation.

TECHNICAL SKILLS & CREDENTIALS

Financial: Financial modeling; budgeting and forecasting; portfolio reporting; variance analysis; present-value analysis; reconciliation and validation; financial statements; grant and regulatory compliance

Technology: Workday Financial Management and Worksheets; Excel (advanced formulas, pivots); Power BI; Tableau; SQL; R; Python; Claude Code; VS Code; Copilot Studio; MCPs; RPAs; reporting automation; data visualization

Credentials: Bloomberg Market Concepts; Excel for Financial Planning & Analysis; Excel Advanced Formulas and Functions; Tableau; Advanced Sponsored Research Administration (AVPRA)