

Andy Meisenhelder

[linkedin.com/in/andymeisenhelder](https://www.linkedin.com/in/andymeisenhelder)

Gainesville, Florida • [AndyAutomates.com/cv](https://www.AndyAutomates.com/cv) • (727) 365-1284

I'm a digital architect who thrives on enhancing business processes in Finance environments. I possess strong creativity skills and perform my best work when problem solving within complex systems. I have a keen ability to envision outcomes three steps ahead. I'm comfortable to serve as translator for IT roles and actively promote the powers of automation to Finance professionals.

WORK EXPERIENCE

Raymond James & Associates **2005 – Present**

Senior Analyst, Business Process Improvement (Financial Reporting) **Feb 2020 - Present**

Gainesville, Florida (Remote)

- Major contributor to the initial CoE design and launch by focusing on business process improvement and automation.
- Manage implementation, QA testing and internal process governance of Finance's Alteryx Server instance.
- Process designer for over two dozen production Alteryx workflow implementations resulting in several hundred hours of ROI.
- Leader of semi-monthly Alteryx Designer's Forum where citizen developers can troubleshoot their personal projects in a collaborative environment.
- SME contact for our Summer College Intern Project and UT Capstone Program. Students fully designed and delivered six unique production workflows for Finance.
- Active as an automation evangelist by providing proof-of-concept presentations and observation of process walkthroughs to encourage development of future projects.

AIS Solutions Specialist/Business **2016–2020**

Systems Analyst II

St. Petersburg, Florida

- Led implementation of automated cloud application, Blackline (task and general ledger reconciliation modules). Served as primary System Administrator for 180+ users, 4,500+ tasks and 8,500+ account reconciliations.
- Served on the firm's PeopleSoft GL implementation team. Completed 18-month Phase I goal of system-go-live. Led team responsible for ledger report requirements, design, testing and production migration.
- User support for general ledger functions of PeopleSoft including journal entry, security rights administration and reporting requests
- System Administrator for Longview (budget software) and Workiva WDesk (SEC reporting and SOX compliance)

Accountant III (Financial Reporting) **2007–2016**

St. Petersburg, Florida

- Maintained all accounting functions of the firm's equity and bond inventories including: daily risk reporting of position limits, weekly P&L reporting and administration of access rights
- Accounting/Financial Reporting Liaison for several subsidiary BUs
- Database administrator for firm's balance sheet reconciliations
- Specialized in foreign currency transactions and commission payouts

**Accountant I (Financial Reporting/ Tech
Billing/Subsidiary Payroll)**

2005-2007

St. Petersburg, Florida

- Lead processor of incoming checks and wires relating to the corporate home office
- Responsible for electronically posting firm-wide advisor commissions, journals containing client fees/reimbursements, and department P&L

EDUCATION

**BSc of Finance, BSc Business, Minor in
Accounting**

2002-2004

University of South Florida.

**PROJECT
HISTORY**

Lead designer on Alteryx Process Automation/Improvements:

- Project lead for Private Client Group's branch profitability project. **ROI – 360 hours/year**
 - Worked with PCG management and reporting teams, developed methodology to capture custom profitability models for three unique divisions
 - Met with fifteen business teams to coordinate various process changes
 - Created profitability for historical periods by leveraging 100k ledger entries
 - Produced nine Alteryx workflows to capture GL activity reclassification, complex allocation models resulting in three customized profitability workbooks
- Ledger Account Notification Workflow. **ROI – 180 hour/year (current)**
 - Coordinated with IT to design a scheduled daily ledger extract
 - When conditions from template match daily ledger activity, an email is delivered to a distribution list containing journal detail
 - Process is scalable to all Finance teams who maintain custom rules via template
- Stock Loan/Stock Borrow monthly summary report. **ROI – 240 hours/year**
 - Collaborated with IT to deliver daily raw text files to a network share drive
 - Clean and normalize seven sources of data to capture summary fields
 - Deliver single page report via email the same morning the report data is available
- Collaborated with multiple diverse business units to automate several early-close accrual entries. **ROI – 42 hours/year**
- Created multi-subsidiary intercompany reclassification workflow (scalable)
- Designed five attribute and calendar libraries for Finance developers to reference
- Currently creating a solution to extract specific monthly mutual fund commission data from a terrabyte zip file containing hundreds of non-delimited files

**TECHNICAL
SKILLS**

Technologies: Alteryx, BlackLine, PeopleSoft Financials, Workiva (WDesk), RPA
Software: Microsoft Excel, Access, VBA, Power Automate, SQL, ServiceNow

INTERESTS

This is my twentieth season as an active Tampa Bay Lightning season ticket holder.

I'm a tenacious deal hunter and enjoy stacking all available angles and offers.