

## **Patricia Cantlin**

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Financial professional with over sixteen years progressive experience in financial reporting, accounting, analysis, financial presentations, contract compliance, statistical modeling, budgeting, database manipulation, rate setting with a proven track record of quickly acclimating to new assignments and improving processes.

### **EXPERIENCE**

**MSI International**, Valley Forge, PA 2009-Present  
Call Center Operations  
Performed outbound marketing research.

#### **Knickers Restaurant**, Dresher, PA 2006-2009

Manager - Oversaw daily operations for 130 seat, family-owned restaurant with a staff of 20 full and part-time requiring scheduling, ordering, budgeting, menu preparation, event planning, customer relations, payroll and monthly financial reporting. Operation had sales up to \$125,000/month.

Managed legal affairs including vendor agreements, employee relations, and regulatory compliance. Successfully completed ServSafe Food Protection Manager Certification.

#### **United Health Group**, Ft. Washington, PA 1998-2006

Manager, Financial Reporting and Reserving Unit. Oversaw all financial, statistical, and statutory reporting for a \$700 million per year Corporate Division with more than 200 monthly reports provided to the client, segment management, corporate officers, National Association of Insurance Commissioners (NAIC), investor conference call, and media inquiries with weekly, monthly, quarterly, and annual deadlines interacting with all departments and staff levels within a group health insurance matrix operation offering multiple product lines requiring oversight of 4-6 direct and indirect reports.

Responsible for gathering, interpreting, assessing, analyzing, and verifying all data required for regulatory reporting requirements in all fifty states and protectorates, requiring segregation by type of product and revenue, using proprietary mainframe computer programs and Microsoft Office products.

Successfully researched and streamlined reporting requirements and processes, reducing reporting time by a third. Recognized for superior achievement resulting in the unit acquiring responsibility for all company-wide health related regulatory reporting.

Revised the national active membership projection models to include input from the marketing, legal, actuarial, and finance departments. The output became the standard membership factors used to calculate monthly, quarterly, annual, and 2-10 year financial and budget projections. Projections were distributed through senior segment management for use by the departments in planning their 18-month operating budgets and through corporate and client management for their 2-10 year financial plans.

Led two 7- member cross-discipline teams to develop Excel models to predict full-time equivalent (FTE) utilization by tying claims and enrollments to marketing efforts and membership projections for a subscriber organization with millions of members enabling the divisions to better predict staffing needs, resulting in budgetary savings of 10-15% and adherence to contractually prescribed service objectives.

Worked directly with the client and an interdepartmental group of 45 representatives to develop financial reports to meet contractual requirements for a new product tracking 1200 metrics. Development took 18 months, half the time normally required; my development of the tracking report required 9 months and was used afterwards as the tool to report client product status.

Sarbanes-Oxley (SOX) report owner- required Federal Government regulatory filing of corporate financial position.

With two days of training, accurately prepared highly critical monthly and annual financial statements for product portfolio.

Automated the calculation of the annual disabled life reserves for the Long Term Care product from three days/three FTE's to nine hours/one FTE.

Responsible for repricing Medicare Supplement insurance rates in three of the most complex states. Submissions were approved without comment (a first!). My submissions were used as a template thereafter.

Restructured monthly accounting close from a 10-day to a 1-day process.

## **EDUCATION**

Bachelor of Business Administration, Actuarial Science, Magna Cum Laude, Temple University, Philadelphia, PA

Commencement speaker – One of two speakers (the other represented the Graduate school) selected by a panel of scholars to speak at School of Business Graduation ceremony based on superior academic achievement and outstanding written and oral communications.

Golden Key National Honor Society, Beta Gamma Sigma National Business Honor Society

## **COMPUTER SKILLS**

MS Office (expert), PeopleSoft query tool, Oracle, COMPAS, Visio

## **TRAINING**

Six-Sigma training, Management and Performance review training, Booke Seminars - Life Annual Statement Preparation Workshop, Fellow Life Management Institute (FLMI)