

# Financial Analyst

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## SUMMARY

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Analytical FP&A analyst with five years building forecasting models and dashboards, fluent in advanced Excel, SQL, and Power BI, recognized for tightening forecast accuracy and turning data into decisions executives act on.

## EXPERIENCE

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### Financial Analyst, FP&A, Quantum Retail Holdings

2021 – Present

*City, ST*

- Built and maintained the annual operating budget and rolling forecast for a \$90M revenue business unit.
- Improved monthly forecast accuracy from a 9% to a 3% variance by rebuilding driver-based revenue models.
- Automated a 30-tab reporting pack with Power Query, cutting the monthly cycle from two days to three hours.
- Delivered variance analysis bridging budget to actual, explaining 95% of movements before the leadership review.
- Built SQL queries against the data warehouse to pull transaction-level detail for ad hoc margin analysis.
- Created a Power BI dashboard of unit-level KPIs that the executive team adopted as its weekly review.
- Modeled three pricing scenarios that informed a decision projected to lift gross margin by \$1.2M annually.
- Partnered with department leads on a zero-based budget that reallocated \$600K toward higher-return spend.

### Junior Financial Analyst, Cornerstone Capital Advisors

2019 – 2021

*City, ST*

- Prepared monthly management reports and KPI summaries for a portfolio of 15 client companies.
- Built discounted-cash-flow and comparable-company models to support two valuation engagements.
- Reconciled actuals to forecast and flagged variances over 5% for the senior analyst's review.
- Compiled industry and market data into research briefs that informed quarterly client updates.
- Maintained a deal-tracking spreadsheet, keeping pipeline status and assumptions current for the team.
- Automated a recurring data import with Excel macros, saving roughly six analyst hours each month.

## EDUCATION

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### Bachelor of Science in Finance

2015 – 2019

*State University — City, ST*

## SKILLS

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Financial modeling · Forecasting and budgeting · Variance analysis · Advanced Excel · SQL · Power BI · Tableau · Valuation (DCF and comps) · Scenario analysis · Management reporting · Data automation · Business partnering