

David Smith

SENIOR FINANCIAL ANALYST | FP&A EXPERT | BUSINESS PARTNER
MBA, CPA QUALIFIED

Location: Sydney, NSW
Email: admin@example.com.au
Tel: 0400 000 000

Linked in

PROFESSIONAL PROFILE



Dynamic, action-oriented finance professional (CPA, MBA), with a fast-track career spanning 12 years across professional practice through to retail and financial services. Expert in commercial decision support, providing financial and risk management assessments to support M&A, contract awards, and expansion activities. Keen eye for strengthening and streamlining resources, and successfully integrating BI and reporting tools (SAP BI, Hyperion, SQL, and VBA) to enhance data mining and automation. Thrives in performance-driven environments.

"David has been nothing short of an inspiration to our team. He offered a dynamic and fresh approach during a complex change period". D.Wilson, Director, OIG Australia.

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| <input checked="" type="checkbox"/> Advance Financial Modelling | <input checked="" type="checkbox"/> Commercial Analysis | <input checked="" type="checkbox"/> Retail & Wholesale Banking |
| <input checked="" type="checkbox"/> Decision Support | <input checked="" type="checkbox"/> AIFRS, GAAP & Tax Regulation | <input checked="" type="checkbox"/> What-If Scenarios |
| <input checked="" type="checkbox"/> IFRS & Audit Compliance | <input checked="" type="checkbox"/> Business Intelligence (BI) | <input checked="" type="checkbox"/> Cost Reductions |
| <input checked="" type="checkbox"/> Foreign Exchange (FX) | <input checked="" type="checkbox"/> Mergers & Acquisitions (M&A) | <input checked="" type="checkbox"/> Budget & Forecasting |
| <input checked="" type="checkbox"/> Sales & Profitability Analysis | <input checked="" type="checkbox"/> Staff Management | <input checked="" type="checkbox"/> Credit & Risk Scoring |

SELECTED HIGHLIGHTS

- Built the financial models to aid the CEO of Finance Australia (FA) in executing an aggressive growth strategy that would grow the business from a \$6.2 million turnover to \$11.3 million in less than 18 months.
- Conducted detailed feasibility reviews of potential M&As for new store acquisitions for OIG Australia, considering both financial and customer demographics. Provided expert recommendations, commentary, and insights to the CEO, CFO, and Board to identify and flag high-risk potential acquisitions.
- Produced What-If models and financial projections to assess the launch of a new Mobile Lending channel for Finance Australia. Post-acquisition, this channel now contributes over 30% of the company's total return.
- Contributed critical data to build the 1, 3, and 5-year strategic plan for Rapid Management Consulting.
- Championed the full introduction of a new PowerBI reporting solution, successfully integrated through SAP and Oracle backend systems, which has been pivotal in enhancing management information systems.

PROFESSIONAL EXPERIENCE

FINANCE AUSTRALIA PTY LTD, SYDNEY

MAY 2022 TO PRESENT

SENIOR FINANCIAL ANALYST

Finance Australia (FA) is a leading financial planning group with operations across all states in Australia and operates from 30 branch locations, as well as through mobile operations. FA employs over 220 registered financial advisers. The Senior Financial Analyst is responsible for providing financial and operational analysis and support to the leadership team.

- Assisted the CEO in developing a new 1, 3, and 5-year strategic plan and led a program of activities that resulted in the business expanding from a small regional network of 4 stores to 22 stores nationwide.
- Conducted in-depth analysis of financial data to produce accurate and meaningful forecasts of business, industry, and economic conditions. This data played a crucial role in planning the opening and closing of branch locations.
- Identified over \$1.3 million in direct cost-saving initiatives that have significantly improved the business's efficiency and operational framework. Implemented visual and interactive dashboards and provided training on trade management to identify further cost-saving opportunities.
- Developed a dynamic "what-if" scenario model using the latest BusinessObjects (BI tools).