

Name: Michael Lee

Contact: (555) 987-6543 | Chicago, IL

Summary:

Detail-oriented Finance Analyst with 4+ years of experience in financial modeling, budgeting, forecasting, and risk analysis. Skilled in using data-driven insights to support strategic decision-making and improve financial performance.

Education:

- Master of Finance, University of Chicago, 2022
- Bachelor of Business Administration, Finance, University of Illinois Urbana-Champaign, 2018

Skills:

- Financial Analysis & Modeling
- Budgeting & Forecasting
- Risk Management
- Tools: Excel (PivotTables, Macros), SAP, Oracle Financials, Bloomberg Terminal
- Data Analysis: SQL, Tableau, Power BI

Experience:

1. Financial Analyst, CapitalOne (Jul 2022 - Present)
 - Prepared detailed financial models to support investment decisions and business planning
 - Developed monthly budget reports and variance analysis to identify cost-saving opportunities
 - Collaborated with cross-functional teams to assess financial risks and compliance
2. Junior Finance Associate, JP Morgan Chase (Jun 2018 - Jun 2022)
 - Assisted in preparing quarterly financial statements and audit documentation
 - Conducted market research and competitor financial benchmarking
 - Automated reporting processes using Excel VBA, reducing report generation time by 30%

Projects:

- **Revenue Forecasting Model:** Built a dynamic forecasting tool improving forecast accuracy by 20%
- **Cost Reduction Initiative:** Identified inefficiencies leading to \$500K annual savings

Certifications:

- CFA Level 1 (Passed)
- Certified Financial Modeling & Valuation Analyst (FMVA)