

## Chelsie Williams

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Enthusiastic Financial Analyst with experience in financial reporting, budgeting, and compliance support across corporate and financial services environments. Skilled in Excel, SQL, Tableau, and Power BI to analyze trends, prepare reports, and support business decisions. Adept at documenting processes, conducting variance analysis, and collaborating with teams to deliver accurate financial insights. Seeking a Financial Analyst role to apply analytical skills and grow within a dynamic finance team.

## SKILLS AND STRENGTHS

### Skills

**Financial Analysis:** Budget tracking, variance analysis, forecasting support, financial reporting, financial modeling, scenario analysis

**Data & Tools:** Excel (PivotTables, VLOOKUP, INDEX/MATCH, Macros), SQL, Python (pandas, NumPy, matplotlib), R (basic), Tableau, Power BI, Microsoft Access, Azure Data Studio, Snowflake

**Business Operations:** Compliance reporting, risk assessment, internal controls, audit support, process improvement, workflow documentation, KPI development, stakeholder reporting

### Key Strengths

**Data Analysis:** Applied financial data analysis to identify trends and opportunities, supporting more informed business decisions.

**Budgeting:** Assisted with budget tracking and variance monitoring to ensure spending stayed aligned with forecasts.

**Reporting:** Created clear, accurate financial reports and visualizations in Excel and Power BI to improve decision-making transparency.

## CERTIFICATIONS

Excel Certified  
Power BI (Beginner Dashboards & Reports)  
CompTIA Security+  
Intro to Technical Writing  
Project Planning & Process Mapping with Lucidchart

## PROFESSIONAL EXPERIENCE

### Financial Analyst

Finance of America - Houston, TX

02/2023 - Present

Delivered financial reporting and budget analysis to support planning and cost management.

- Increased financial transparency by assisting in preparing monthly reports tracking expenses and revenues.
- Assisted with forecasting and financial planning by analyzing historical spending trends.
- Created dashboards and visual reports in Power BI to improve financial data transparency.
- Partnered with leadership to present financial insights for decision-making on budgets and operations.
- Maintained accurate financial records to ensure compliance and transparency in community operations.

### Financial Analyst – Risk & Compliance

Northwestern Mutual– Houston, TX

07/2022 - 01/2023

Provided financial reporting and compliance support to ensure accuracy and audit readiness.

- Prepared financial reports and variance analysis to support compliance and audit requirements.
- Collected and reviewed financial data to ensure accuracy and adherence to regulatory standards.
- Built and maintained reporting templates in Excel to streamline financial tracking.
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- Assisted with internal reporting and documentation to strengthen compliance performance.

### Financial Analyst Intern

J.P. Morgan – Houston, TX

05/2022 - 06/2022

Provided financial management support by preparing reports and developing financial models to assist client portfolio strategies.

- Collaborated with analysts to prepare presentations and reports for senior leadership and client meetings.
- Improved efficiency and cost-effectiveness of operations by initiating and managing financial systems.
- Assisted with financial modeling and analysis to support investment and client portfolio strategies.
- Conducted market and risk research to evaluate industry trends and inform decision-making.
- Built and maintained Excel and Power BI reports to track key performance and financial metrics.

## PROJECTS

### Financial Reporting Automation for Finance of America

Excel, Power BI, SQL

- Designed automated reporting templates in Excel to streamline monthly reporting and variance analysis.
- Built Power BI dashboards to improve transparency of spending and budgeting for leadership teams.
- Reduced monthly reporting cycle time by 15% through automation and better data visualization.

### Regulatory Compliance Reporting for a Financial Services Client

*Excel, Power BI, SQL*

- Collaborated with client compliance officers to track key financial controls and audit readiness.
- Developed Excel-based compliance templates and variance reports to monitor adherence to regulatory standards.
- Improved audit preparation efficiency by reducing manual data collection time by 25%.

### Investment Portfolio Insights at J.P. Morgan

*Excel, Financial Modeling, Power BI*

- Conducted market and risk research to evaluate investment strategies and industry benchmarks.
- Built Excel-based financial models and Power BI reports to track portfolio performance and KPIs.
- Supported analysts with data-driven presentations used in senior leadership and client meetings.

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## EDUCATION

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University of Houston-Downtown  
**Bachelor of Business Administration in Finance**