

# CHELSEIE WILLIAMS

## CORE SKILLS

### Financial Analysis:

Budget tracking, variance analysis, forecasting support, financial reporting

### Data & Tools:

Excel (PivotTables, VLOOKUP, Macros), SQL, Python (pandas), Tableau, Power BI

### Business Operations:

Compliance reporting, risk assessment, process improvement

### Professional Strengths:

Analytical thinking, reporting accuracy, stakeholder communication

## 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.

## KEY ACHIEVEMENTS

### Financial Reporting Support

Helped streamline monthly reporting by organizing financial data, reducing reporting time by 15%

### Variance Tracking

Assisted in variance analysis that improved accuracy in budget forecasting.

### Audit Readiness

Supported compliance and audit preparation at Northwestern Mutual by reviewing financial data for accuracy.

## Financial Analyst | Reporting | Forecasting

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## SUMMARY

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.

## EXPERIENCE

### Jr. Financial Analyst

02/2023 - Present

#### Homeowners Association (HOA)

Houston, Texas

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.

### Jr. Financial Analyst – Risk & Compliance

07/2022 - 01/2023

#### Northwestern Mutual

Houston, Texas

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.
- Collaborated with senior analysts to monitor financial controls and identify potential risks.
- Assisted with internal reporting and documentation to strengthen compliance performance.

### Financial Analyst Intern

05/2022 - 06/2022

#### J.P. Morgan

Houston, Texas

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

- 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.
- Collaborated with analysts to prepare presentations and reports for senior leadership and client meetings.

## EDUCATION

### Bachelor of Business Administration in Finance

#### University of Houston-Downtown

# CERTIFICATION

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Excel Certified

Power BI

CompTIA Security+

Intro to Technical Writing

Project Planning & Process Mapping  
with Lucidchart