

# Daniel Anderson

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Target Field: Finance

## PROFILE

FP&A; Analyst with experience delivering measurable outcomes in Finance. Strong in execution, clear communication, and building systems that scale. Comfortable owning work end-to-end and collaborating across teams.

## EDUCATION

**Boston University**  
B.S.B.A. Finance

Portland, OR  
2021 — 2025

- Dean's List (2 semesters); Coursework: Statistics, Databases, Strategy

## EXPERIENCE

### FP&A; Analyst — Evergreen Capital

Austin, TX | Sep 2023 — Present

- Led a cross-functional initiative; improved a key metric by 18% through iteration and better tooling.
- Created dashboards and recurring reporting; reduced decision turnaround time by 30%.
- Standardized processes and documentation; cut manual effort by 65% and improved consistency.
- Partnered with stakeholders to define requirements, align on scope, and deliver on schedule.

### FP&A; Analyst Intern — Cobalt Partners

Atlanta, GA | Jul 2021 — May 2023

- Automated a cross-functional initiative; improved a key metric by 12% through iteration and better tooling.
- Created dashboards and recurring reporting; reduced decision turnaround time by 30%.
- Standardized processes and documentation; cut manual effort by 65% and improved consistency.

### Finance Assistant — Stonebridge Finance

Miami, FL | Jun 2019 — Jun 2021

- Improved a cross-functional initiative; improved a key metric by 18% through iteration and better tooling.
- Created dashboards and recurring reporting; reduced decision turnaround time by 30%.
- Standardized processes and documentation; cut manual effort by 45% and improved consistency.

## PROJECTS

### Spend Controls Dashboard

- Created a dashboard to monitor spend vs. budget and flag anomalies.
- Improved visibility for leadership and finance partners.
- Presented results to stakeholders and documented next steps.

### Operating Forecast Model

- Built a rolling forecast model with scenario analysis and sensitivity tables.
- Automated monthly refreshes and improved narrative reporting.
- Presented results to stakeholders and documented next steps.

### Valuation Case Study

- Completed DCF + comps for a mid-market company and wrote an investment memo.
- Stress-tested assumptions and summarized key risks.
- Presented results to stakeholders and documented next steps.

## SKILLS

**Skills:** Variance analysis, Stakeholder updates, Risk metrics, Excel, Valuation, Financial modeling, PowerPoint, Budgeting, SQL basics, Forecasting

**Certifications:** CFA Level I (In Progress), Bloomberg Market Concepts (BMC), FMVA (In Progress)