

Ivy Roberts

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Target Field: Finance

PROFILE

Financial Analyst with experience in Finance. Comfortable working with teams to get projects done and support day-to-day operations. Looking to grow impact in a fast-paced environment.

EDUCATION

University of Virginia

B.A. Economics

Boston, MA

2019 — 2023

- Activities: student org member

EXPERIENCE

Financial Analyst — Cobalt Partners

Austin, TX | Sep 2023 — Present

- Supported execution and kept tasks organized across multiple stakeholders.
- Helped maintain reporting and basic analysis to track progress against goals.
- Improved documentation and created templates to make work more consistent.

FP&A; Analyst — Summit Advisory

Atlanta, GA | Jul 2021 — May 2023

- Supported execution and kept tasks organized across multiple stakeholders.
- Helped maintain reporting and basic analysis to track progress against goals.
- Improved documentation and created templates to make work more consistent.

Coordinator — Stonebridge Finance

Nashville, TN | Jun 2019 — Jun 2021

- Supported execution and kept tasks organized across multiple stakeholders.
- Helped maintain reporting and basic analysis to track progress against goals.

PROJECTS

Operating Forecast Model

- Built a rolling forecast model with scenario analysis and sensitivity tables.
- Automated monthly refreshes and improved narrative reporting.

Spend Controls Dashboard

- Created a dashboard to monitor spend vs. budget and flag anomalies.
- Improved visibility for leadership and finance partners.

SKILLS

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

Certifications: FMVA (In Progress), CFA Level I (In Progress)