

JAYVEEN PATEL

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SUMMARY

Strategic and results-focused **Financial Planning & Analysis (FP&A) Analyst** with 4+ years of experience driving financial performance, strategic planning, and business decision-making within banking and financial services. Expertise in **budgeting, forecasting, P&L analysis, and data-driven financial modeling** to support profitability and operational efficiency. Skilled at leveraging **SQL, Python, Power BI, and advanced Excel** to automate complex financial processes, deliver **insightful variance analysis**, and translate data into actionable recommendations for senior leadership. Recognized for improving forecast accuracy, optimizing resource allocation, and building scalable financial models that align with corporate objectives.

SKILLS

Financial Planning & Analysis: Budgeting & Forecasting, Variance Analysis, P&L Management, Cash Flow Analysis, Balance Sheet Analysis, KPI Tracking, Scenario & Sensitivity Modeling, Financial Reporting

Data Analysis & Reporting: Advanced Excel (Pivot Tables, VLOOKUP/XLOOKUP, Macros, Power Query), SQL, Python, Data Validation, Trend Analysis, Ad-hoc Reporting

Business Intelligence & Visualization: Power BI, Tableau, Excel Dashboards, KPI Reporting

ERP & Financial Systems: SAP FICO, Oracle Financials, NetSuite, QuickBooks, Hyperion

Accounting & Compliance: GAAP & IFRS Standards, Internal Controls, Audit Support, Regulatory Reporting, SOX Compliance

Process & Strategy: Process Improvement, Cost Analysis, Budget Optimization, Forecast Accuracy Improvement, Cross-Functional Collaboration, Financial Insights for Decision Making

Other Tools & Technologies: VBA, Basic Alteryx / Power Automate, Solver & Analysis ToolPak, Adaptive Insights, Anaplan

EXPERIENCE

FP&A Analyst | Wells Fargo, TX

Jun 2024 – Present

- Directed and managed a \$1.2B annual operating budget for Consumer Banking, improving forecast precision by 10% and accelerating approval cycles by 15% through automated Excel models and SAP FICO workflows.
- Developed data-integrated financial forecasts using SQL, Bloomberg data, and Python analytics, cutting forecast variance from 8% to 5% and strengthening decision-making accuracy.
- Conducted in-depth variance and cost-driver analysis, identifying operational inefficiencies and realizing \$2M in annual savings.
- Built multi-scenario financial models to simulate interest rate fluctuations, liquidity risk, and deposit growth, guiding long-term strategic planning.
- Automated 15+ recurring reporting dashboards through Power Query and VBA, reducing manual workload by 30% and increasing data reliability.
- Delivered executive-level Power BI dashboards showcasing KPIs, revenue trends, and performance metrics to support senior leadership strategy reviews

Financial Data Analyst | Sundaram Finance Pvt., India

Nov 2022 – Jul 2023

- Consolidated monthly and annual financial statements from SAP and Oracle systems with 100% accuracy, supporting board and investor reporting.
- Conducted KPI and ratio analyses (NIM, ROA, Cost-to-Income) to drive cost reductions of 12% over two years.
- Enhanced forecast accuracy by 15% through scenario-based Excel models.
- Automated reporting workflows using VBA and Power Query, reducing preparation time by 30%.
- Designed interactive Power BI dashboards to visualize financial trends and variance analysis, improving decision speed by 25%.
- Ensured full RBI and SEBI compliance, achieving zero audit discrepancies.

Business Finance Analyst | Accenture, India

Jan 2021 – Oct 2022

- Built driver-based forecasting models for deposits, loans, and liquidity, improving prediction accuracy by 18%.
- Executed profitability and sensitivity analyses using SQL/Python to identify high-value segments, increasing engagement by 22%.
- Automated Power BI performance dashboards, cutting reporting time from 2 days to 4 hours.
- Partnered with risk teams to develop fraud detection analytics, flagging \$1.5M in high-risk transactions.
- Standardized financial reporting templates, ensuring audit-ready and consistent outputs.
- Mentored junior analysts in financial modeling and BI automation, improving team performance and delivery quality

EDUCATION

Master of Science in Business Analytics – East Texas A&M University, Commerce, Texas, USA

Bachelor of Science in Computer Science - Devi Ahilya Vishwavidyalaya University, India

CERTIFICATIONS

- Microsoft Azure Data Fundamentals (AZ-900)
- Microsoft Azure AI Fundamentals (AI-900)