

Kalyan Vutukuri

Financial Analyst

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SUMMARY

- Finance Analyst with 4+ years of experience in conducting cash flow analysis, P&L reviews, and balance sheet reconciliation using Excel, SQL, Python, and Alteryx to deliver actionable insights that improve financial performance and support strategic decision-making.
- Experienced in end-to-end budgeting, forecasting, and variance analysis across departments, working closely with cross-functional teams to optimize cost structures, monitor KPIs, and support executive-level financial planning.
- Proficient in developing interactive dashboards and automated reporting tools using Power BI, Tableau, Excel VBA, and Looker, enabling accurate, real-time financial monitoring and enhancing month-end close efficiency.
- Skilled in financial modeling and business case development using techniques like DCF, IRR, NPV, scenario analysis, and break-even analysis to support capital investment decisions, pricing strategies, and profitability evaluations.
- Expert in ERP systems including SAP, Oracle, NetSuite, and Workday; strong understanding of GAAP, SOX compliance, revenue recognition (ASC 606), cost accounting, audit support, and internal control frameworks.

SKILLS

Programming & Query Languages: SQL, Python, VBA

Databases & Data Warehousing: MySQL, PostgreSQL, Snowflake, MS SQL Server

Financial Analysis & Modeling: Budgeting, Forecasting, Variance Analysis, Scenario Modeling, Sensitivity Analysis, Risk Assessment

Business Intelligence & Data Visualization: Power BI, Tableau, Looker, KPI Dashboards

Financial Reporting & Automation: Excel VBA, Alteryx, SEC Reporting, SOX Compliance, GAAP Reporting, Financial Reconciliation

Accounting & Core Financial Statements: Cash Flow Analysis, P&L Management, Balance Sheet Reporting, General Ledger Accounting

Investment & Valuation Techniques: DCF, NPV, IRR, Capital Budgeting, ROI Analysis

ERP & Financial Systems: SAP FI/CO, Oracle Financials

Workflow & Project Management: Jira, Agile (Scrum, Kanban), Process Improvement, BRD & FSD Documentation

PROFESSIONAL EXPERIENCE

Edward Jones

Jan 2024–Present | St.Louis, Missouri

Financial Analyst

- Partnered with product strategy, treasury, and operations teams to build detailed monthly forecasts, multi-scenario financial models, and budget-to-actual reports for a \$200M+ retail investment product portfolio, supporting strategic business growth initiatives.
- Designed comprehensive Excel-based models using advanced formulas, Power Query, and Python scripting to forecast revenue inflows, manage liquidity reserves, and track segment-wise profitability with improved reporting accuracy across departments.
- Developed and maintained Power BI dashboards to provide real-time visibility into financial KPIs such as revenue growth, asset under management (AUM), client retention, and operational margins, enabling faster executive decision-making.
- Performed in-depth variance and trend analysis on expenses, cost allocations, and capital expenditures, identifying recurring inefficiencies and helping leadership control spending more effectively.
- Collaborated with cross-functional partners in FP&A, business intelligence, compliance, and finance operations to integrate financial data with strategic business planning, improving alignment between business targets and actual performance.
- Leveraged Alteryx and Oracle ERP tools to automate financial reconciliations, reduce manual data manipulation, and enhance reporting consistency during monthly and quarterly close cycles.
- Conducted return on investment (ROI), net present value (NPV), and internal rate of return (IRR) analysis to support project evaluations, helping senior leadership prioritize capital expenditures and investment strategies.

LTIMindtree

Nov 2020–Dec2022 | Hyderabad, India

Financial Analyst

- Led the preparation of department-wide annual budgets, quarterly forecasts, and multi-year strategic financial models across three cost centers valued at ₹40 Cr, achieving over 95% forecast accuracy in alignment with corporate performance targets.
- Performed detailed cost-benefit, sensitivity, and breakeven analyses for enterprise-wide IT modernization projects, enabling ₹8 Cr in cost savings through effective financial planning and cost control measures.
- Created SQL-powered Power BI dashboards to monitor real-time department expenses, margin trends, and profitability metrics across business units, helping senior management make timely and data-driven decisions.
- Automated recurring reporting cycles and intercompany reconciliations by integrating Alteryx workflows and Excel VBA scripts, improving efficiency and reducing manual processing errors by over 50%.
- Worked with SAP S/4HANA and Oracle EBS teams to configure and optimize cost allocation models, capital budgeting workflows, and fixed asset tracking mechanisms, ensuring audit readiness and compliance.
- Generated and reviewed balance sheets, P&L statements, and account reconciliations in accordance with IFRS and Indian GAAP requirements, enabling clean internal audits and strong governance across financial records.

Accenture

Aug 2019–Oct 2020 | Chennai, India

Junior Financial Analyst

- Supported month-end financial close by managing accruals, adjusting journal entries, and reconciling general ledger accounts across multiple global cost centers with high-volume data accuracy.
- Produced detailed monthly budget-to-actual variance reports and financial commentary that identified opportunities to reduce overhead costs by 10%, directly influencing department-level operational improvements.
- Extracted and interpreted large datasets from Snowflake and MySQL systems to generate ad-hoc financial reports, enabling business leaders to make over 50 key decisions based on real-time data insights.
- Architected and implemented standardized Excel templates for zero-based budgeting and cash flow forecasting across departments, improving budget transparency and coordination between finance and operations teams.
- Assisted with Sarbanes-Oxley (SOX) control documentation, audit trail development, and testing processes, contributing to three consecutive quarters with zero audit findings or compliance gaps.

EDUCATION

Master of Science in Information Technology and Management

Webster University St louis, Missouri