



Charlie Perry

Financial Analyst

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SUMMARY

Ambitious financial analyst eager to enrich skills in a dynamic Finance Development Program at Dynamic Financial Solutions. Background includes three years of experience across finance and accounting domains, where collaboration proved vital in driving process improvements. Consistently demonstrated strong analytical abilities during internal audits, enhancing compliance and efficiency. Influenced teams positively, cultivating environments ripe for sharing insights. Eagerness encompasses hands-on learning through various programs and project rotations, while the willingness to tackle diverse assignments reflects dedication to developing expertise in contemporary finance functions.

EDUCATION

Bachelor's Degree in Finance

University of State 🎓 GPA: 3.8 📅 2022 📍 Columbus, OH

Coursework: *Financial Analysis, Budgeting and Forecasting, Internal Audits, Cross-Functional Collaboration*

TECHNICAL SKILLS

- **Accounting Software:** QuickBooks, SAP, NetSuite
- **Financial Modelling Tools:** Excel, IBM Planning Analytics, Tableau
- **Project Management Tools:** Trello, Asana, Microsoft Project
- **Data Analysis Tools:** R, Python, SQL
- **Presentation Software:** PowerPoint, Prezi, Google Slides
- **Collaboration Tools:** Slack, Teams, Zoom
- **Document Management Systems:** SharePoint, Confluence, Google Drive
- **Compliance Tracking Tools:** SAP GRC, MetricStream, RiskWatch
- **Database Management:** Oracle, MySQL, Microsoft Access
- **Report Generation Tools:** Crystal Reports, SSRS, Business Objects

EXPERIENCE

Financial Analyst

Future Financial Group 📅 June 2023 - Present 📍 Columbus, OH

Current role involves supporting managerial finance and accounting tasks. Responsibilities highlight involvement with budgeting, reporting, and compliance processes. Collaborating effectively with cross-functional teams, I contribute towards improving efficiencies within financial workflows. Provides analysis aimed at enhancing departmental goal alignment as well.

- Conducted thorough budget analyses impacting key decision-making processes.
- Crafted detailed financial reports, enabling departments to meet their strategic goals.
- Worked closely with team members from different departments to refine financial reporting accuracy.
- Assisted in overseeing regulatory compliance through timely internal audit preparations.

Finance Intern

Star Financial Services 📅 June 2022 - May 2023 📍 Cincinnati, OH

Internship focused on gaining practical exposure in financial analytics and operations. Supported senior analysts by helping prepare crucial financial statements and uncovering trends through variance analyses. Engaged in efforts aligned with operational improvement projects alongside seasoned professionals.

- Aid in crafting financial statements, contributing to overall accuracy in stated financial positions.
- Collaborated on variance analyses pinpointing actual versus projected performance measurements.

STRENGTHS

- **Analytical Thinking**
Strength has shaped efficient problem-solving practices addressing intricate issues during audits.
- **Collaboration**
Displayed talents working cohesively, often earning trust from peers seeking advice on complex challenges.
- **Initiative**
Acted upon recognizing performance bottlenecks, advocating necessary changes that led to positive impacts.
- **Communication Skills**
Utilized clear communication patterns, fostering effective dialogues in multidisciplinary settings increasing task clarity.
- **Leadership**
Demonstrated leadership during student-led finance organizations, securing resources beneficial to all members involved.

SKILLS

Financial Analysis

Budgeting and Forecasting

Internal Audits

Cross-Functional Collaboration

Advanced Excel Variance Analysis

Reporting Accuracy

Regulatory Compliance

Team Projects Problem Solving

Data Interpretation

Statistical Modeling

Financial Accounting

Process Improvement

Risk Management

LANGUAGES

English Native

Spanish Proficient

MY CAREER



● Financial Analyst at Future Financial Group (3 Years)

● Finance Intern at Star Financial Services (11 Months)

● Finance Project at University of State (1.8 Years)

- Develop hands-on knowledge surrounding general ledger accounting principles leading to enhanced forecasting.
- Participated in team initiatives, ensuring contributions were made toward improved finance operations.

Finance Project

University of State 📅 August 2020 - May 2022 📍 Columbus, OH

Led university finance project that involved analyzing and assessing financial viability of local businesses. Substantial insight gained into interpreting data, presenting findings, and facilitating actionable recommendations for growth opportunities as well.

- Steered a team in evaluating local business financial performance impacting community outcomes.
- Developed comprehensive financial reports based on thorough research methodologies.
- Presented results before faculty members and industry professionals, showcasing project outcomes.
- Engaged collaboratively, emphasizing teamwork that resulted in successful project completion.

LEADERSHIP & AWARDS

- Outstanding Contributor Award for teamwork and advocacy during multi-departmental initiatives.
- Recognition for academic excellence in Finance from University of State.

CERTIFICATIONS

- Certified Financial Analyst Level I 📅 2023
- Excel Certification 📅 2024

PROFESSIONAL AFFILIATIONS

- Volunteer Finance Tutor providing support in financial literacy programs.
- Member of the National Finance Society committed to networking and professional development.

ADDITIONAL INFORMATION

Work Status : Authorized to work in United States. No sponsorship required.

REFERENCES

AVAILABLE ON REQUEST