



Delilah Allison

Senior Financial Planning & Analysis Analyst

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SUMMARY

Passionate financial analyst boasting over seven years in financial planning and analysis, especially skilled in advanced reporting and data extraction. Expertise lies within SQL, Microsoft Excel, and business intelligence tools, allowing the delivery of insightful financial narratives. Compelled by a commitment to quality service, consistently collaborate with various teams ensuring alignment on strategic initiatives. Foster strong client relationships while grasping complex data presented in easily digestible formats. Eager for opportunities that challenge abilities and evoke innovative solutions.

EXPERIENCE

Financial Planning & Analysis Manager

Strategic Finance Group 📅 January 2020 - Present 📍 Denver, CO

Steer preparation efforts for monthly, quarterly, and annual reports essential for executive decision-making. Collaborate actively with cross-functional teams for impactful financial analyses and forecasting. Design complex SQL queries to extract pertinent financial data tailored to reporting requirements. Employ advanced Excel features to establish dynamic models and dashboards enhancing overall clarity in presentations.

- Lead monthly financial report preparation, providing critical insights to senior management.
- Integrate collaborative approaches with multiple departments to enforce effective financial forecasts.
- Institute best practices through SQL for precise financial data extraction and accuracy.
- Create engaging presentations utilizing visual elements within Excel promoting data insights.

Senior Financial Analyst

Capital Insights LLC 📅 June 2016 - December 2019 📍 Boulder, CO

Played an instrumental role in reengineering financial reporting processes, improving both accuracy and operational efficiency. Engaged deeply with teams evaluating financial trends, translating findings into actionable suggestions for business growth. Played a crucial part in budget preparations, collaborating across departments for cohesive strategic financial planning.

- Implemented innovative procedures for financial reporting that enhanced precision.
- Conducted rigorous analyses unveiling financial trends that shaped departmental strategies.
- Cultivated partnerships across functions for unified workflow during budgeting processes.
- Enhanced communication pathways among departments ensuring streamlined reporting and forecasting.

Financial Analyst

Innovative Financial Solutions 📅 August 2014 - May 2016 📍 Fort Collins, CO

Built high-detail financial models driving informed business decisions grounded in accurate data interpretation. Managed timelines associated with monthly closing activities ensuring variances were thoroughly evaluated. Fostered strong collaboration with accounting teams securing integrity across all reporting dimensions.

- Produced comprehensive financial models supporting key investment decisions.
- Oversaw month-end close activities, aligning reporting metrics with actuals.
- Worked hand-in-hand with accounting teams to ensure prediction reliability.
- Contributed extensively to variance analyses, identifying deviations and underlying causes.

LEADERSHIP & AWARDS

- Recognized as Top Financial Analyst at Strategic Finance Group in 2021 for excellence in reporting.
- Received Team Excellence Award leading implementation of collaborative financial systems throughout Capital Insights.

STRENGTHS

- 📊 **Analytical Expertise**
Interpreted complex data sets, earning appreciation from leadership for clear summaries.
- 👥 **Collaboration Skills**
Built lasting partnerships that eased burdens on project completion, praised across departments.
- 👤 **Client Focused**
Consistently prioritized client needs tenfold, gaining respect and trust within client interactions.
- 💬 **Effective Communication**
Respected for presenting detailed analyses in simpler terms, facilitating comprehension among stakeholders.
- 🚩 **Project Leadership**
Driven projects with unwavering adherence to goals, whose success stories resonated throughout organizations.

SKILLS

Financial Planning & Analysis SQL

Microsoft Excel (Power Query, Pivot Tables)

Business Intelligence Tools

Financial Reporting Data Analysis

Forecasting Variance Analysis

Cash Flow Management

Budget Development

Financial Statement Analysis

Project Management

Communication Skills

Collaboration Expertise

Customer Service Orientation

Management Reporting

LANGUAGES

English Native

Spanish Proficient

MY CAREER



- Financial Planning & Analysis Manager at Strategic Finance Group (6.4 Years)
- Senior Financial Analyst at Capital Insights LLC (3.5 Years)
- Financial Analyst at Innovative Financial Solutions (1.8 Years)

EDUCATION

Bachelor of Science in Finance

University of Colorado Boulder 🎓 GPA: 3.9 📅 2014 📍 Boulder, CO

Coursework: *Financial Management, Data Interpretation, Corporate Finance, Statistical Analysis*

CERTIFICATIONS

- Certified Financial Analyst (CFA) 📅 2022
- Financial Modeling Certification 📅 2020

TECHNICAL SKILLS

- **Data Analysis Tools:** Tableau, Power BI, Lookup Functions
- **Database Management Systems:** MySQL, Oracle SQL, PostgreSQL
- **Spreadsheet Tools:** Microsoft Excel, Google Sheets, LibreOffice Calc
- **Reporting Systems:** SAP, Business Objects, Adaptive Insights
- **Programming Languages:** Python, R, JavaScript
- **Communication Platforms:** Slack, Zoom, Microsoft Teams
- **Cloud Services:** AWS, Microsoft Azure, Google Drive
- **Project Management Tools:** Trello, Asana, JIRA
- **Documentation Tools:** Confluence, SharePoint, Notion
- **Financial Software:** QuickBooks, Sage Intacct, Zoho Books

PROFESSIONAL AFFILIATIONS

- Active Member of the Financial Planning Association (FPA), contributing to professional discourse around industry trends.
- Volunteer Mentor at Junior Achievement, fostering financial literacy among local youth.

ADDITIONAL INFORMATION

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

REFERENCES

AVAILABLE ON REQUEST