

Jordan Lee

SENIOR FINANCIAL ANALYST

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SUMMARY

Financial analyst with seven years in FP&A at mid-size software and healthcare firms. Builds the forecast models leaders use to set budgets, and explains the numbers in plain words to people who do not read spreadsheets.

EXPERIENCE

Senior Financial Analyst

Mar 2022 to Present

Brightline Health, Austin, TX

- Own the \$240M operating budget forecast for 14 clinics and present variances to the CFO each month
- Cut month-end reporting from 9 days to 5 by rebuilding the Excel model in Power BI
- Built a staffing cost model that found \$2.3M in overtime savings across three regions
- Train 6 clinic managers a year on reading their own budget reports

Financial Analyst

Jun 2019 to Feb 2022

Cedar Software, Dallas, TX

- Built the pricing model used in 30+ enterprise deals worth \$18M in contract value
- Found \$1.2M in duplicate vendor spend during a contract review
- Automated the weekly bookings report, saving the sales team 6 hours a week

Staff Accountant

Aug 2017 to May 2019

Hill & Moreno LLP, Dallas, TX

- Prepared monthly reconciliations for 40 client accounts with zero audit findings
- Supported year-end audits for 12 nonprofit clients

EDUCATION

BBA in Finance

2013 to 2017

University of Texas at Austin, Austin, TX

- GPA 3.7, Dean's List, Finance Club treasurer

SKILLS

Finance: Forecasting, budgeting, variance analysis, pricing models, FP&A

Tools: Excel (advanced), Power BI, SQL, NetSuite, Adaptive Planning

Languages: English, Spanish (professional)

CERTIFICATIONS

- Certified Management Accountant (CMA), 2021
- Financial Modeling and Valuation Analyst (FMVA), 2020

VOLUNTEER WORK

Treasurer, Austin Youth Soccer League, 2020 to Present