Samuel Li

# Financial Analyst

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LinkedIn | Portfolio

Financial analyst with seven years of experience supporting budgeting, forecasting, and data-driven decision-making in corporate finance environments. Skilled in financial modeling, variance analysis, and dashboard reporting. Known for translating complex data into actionable insights to improve profitability and operational efficiency.

# PROFESSIONAL EXPERIENCE



## Financial Analyst

*Brighton & Vale Capital, Chicago, IL | June 2020 - Present*

Develop financial models to support $15 million in annual revenue forecasting across multiple business units

Analyze cost drivers and identify savings opportunities that reduced operational expenses by 12%

Prepare monthly and quarterly reports for executive leadership and investor relations

## Junior Financial Analyst

*Lennix Manufacturing Group, Oak Brook, IL | July 2017 - May 2020*

Supported budgeting and cash flow planning for manufacturing operations across three domestic plants

Conducted variance analysis and reconciled discrepancies, contributing to faster monthly close cycles

Built Excel dashboards for department heads, streamlining performance tracking and reporting

# KEY SKILLS

Budget analysis Cost modeling Data visualization

Financial forecasting Variance analysis

# EDUCATION AND CERTIFICATIONS

## Bachelor of Science (B.S.) Finance

DePaul University, Chicago, IL | May 2017

## Chartered Financial Analyst (CFA) Level I

CFA Institute | 2021

## Financial Modeling & Valuation Analyst (FMVA)

Corporate Finance Institute | 2020