



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