MARCUS BELL

Senior Financial Analyst | FP&A, Budgeting, and Forecasting

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SUMMARY

Financial analyst with 8 years of FP&A experience at a $1.2B consumer products company, a regional bank, and a freight brokerage. Lead the $340M annual operating expense budget and the monthly rolling forecast for 4 business units. Built a driver-based forecast model that cut operating income forecast error from 6.5% to 2.1%. Advanced Excel, SQL, Power BI, and Oracle Hyperion Planning.

EXPERIENCE

Senior Financial Analyst, FP&A — *Tessaro Consumer Brands* Jan 2023–Present

Consumer products company with $1.2B in annual revenue, 4 business units, and a 12-person FP&A team; SAP S/4HANA ERP.

- Lead the annual operating budget for $340M in operating expenses across 4 business units and 28 cost centers; delivered the 2026 budget to the board 3 weeks earlier than the prior year.
- Built a driver-based rolling forecast in Excel and Oracle Hyperion Planning; operating income forecast error fell from 6.5% to 2.1% in 4 quarters.
- Prepare the monthly budget-to-actual variance report for the CFO and 4 business unit presidents, with an explanation for each variance above $250K.
- Modeled a $14M warehouse automation project with NPV, IRR, and payback; the board approved it, and it met its $2.6M first-year savings target.
- Automated 6 monthly reports with SQL and Power BI, which saved 30 analyst hours per month.

Financial Analyst — *Ardent Valley Bank* Jun 2020–Dec 2022

Regional bank with $6B in assets and 52 branches.

- Prepared the monthly profitability report for 52 branches and 3 lines of business for the executive team.
- Built the expense budget for 9 support departments with $48M in total spend; actual spend stayed within 1.5% of budget for 2 years.
- Modeled deposit pricing scenarios for the asset-liability committee; a rate change on 2 savings products added $1.1M in annual net interest income.
- Cut the monthly reporting cycle from 6 to 3 business days with Alteryx workflows that replaced 14 manual Excel steps.

Financial Analyst I — *Fenwick Lane Freight* Jul 2018–May 2020

Freight brokerage with $400M in annual revenue and 6 regional offices.

- Tracked budget-to-actual results for 6 regional offices and explained each variance above $50K to the office managers.
- Built a profitability model for the top 75 customers; the sales team repriced 11 accounts, and gross margin rose 1.8 points.
- Prepared the weekly 13-week cash forecast, with an average error under 4%.
- Built the headcount and salary model for 640 employees for the annual budget.

EDUCATION

Eastbrook University May 2018

Bachelor of Business Administration in Finance

SKILLS

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FP&A: Annual budget, Rolling forecast, Variance analysis, Driver-based modeling, Three-statement modeling, Capital budgeting (NPV, IRR, payback), Scenario analysis, Management reporting

Systems and data: Excel (advanced), Oracle Hyperion Planning, SAP S/4HANA, SQL, Power BI, Alteryx

CERTIFICATES

Passed Level I of the CFA Program Jan 2022

CFA Institute

Microsoft Certified: Power BI Data Analyst Associate Apr 2024

Microsoft

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