

SKILLS TO PUT ON RESUME FOR FINANCIAL ANALYSTS

Professional Resume Series • Profession 9 of 40

GUIDE OVERVIEW: WHAT TO INCLUDE, WHAT TO EXCLUDE & HOW TO STRUCTURE

When crafting a Financial Analyst resume, emphasize quantitative modeling, forecasting, valuation techniques, variance analysis, financial reporting, and ERP/BI software. Exclude generic bookkeeping tasks, unverified Excel claims without concrete functions, and basic math skills. Categorize your skill set into core functional disciplines (e.g., *Financial Modeling & Valuation*, *FP&A & Forecasting*, *Financial Reporting*, *Tech & ERP Platforms*) and directly link your analysis to cost savings, revenue growth, or deal volume.

1. CORE FINANCIAL ANALYST SKILLS

Financial Modeling & Valuation

- **Models:** 3-Statement Modeling, DCF (Discounted Cash Flow), LBO, M&A Models
- **Valuation:** Trading Comps, Precedent Transactions, NAV, IRR, NPV Analysis
- **Sensitivity:** Scenario Modeling, Sensitivity Tables, Monte Carlo Analysis

FP&A & Budgeting

- **Forecasting:** Annual Budgeting, Rolling Forecasts, Long-Range Planning (LRP)
- **Variance:** Budget vs. Actual (BvA) Analysis, Variance Reporting
- **Metrics:** EBITDA, Working Capital, Free Cash Flow (FCF), Capex/Opex

Advanced Excel & Financial Software

- **Excel:** XLOOKUP, INDEX/MATCH, Dynamic Arrays, Power Query, VBA/Macros
- **ERP Systems:** SAP, Oracle NetSuite, Workday Financials, Microsoft Dynamics
- **FP&A Tools:** Anaplan, Hyperion (HFM), Adaptive Planning, Pigment

Accounting, Reporting & Compliance

- **Standards:** US GAAP, IFRS, Revenue Recognition (ASC 606), Lease Accounting
- **Reporting:** Executive Board Decks, SEC Filings (10-K, 10-Q), Audit Prep
- **Controls:** Internal Controls, SOX Compliance, Reconciliation

Data Analytics & BI for Finance

- **BI Platforms:** Power BI, Tableau, Alteryx, Looker
- **Data Querying:** Financial Data Extraction, SQL, Python for Finance
- **Market Terminals:** Bloomberg Terminal, FactSet, PitchBook, Capital IQ

Certifications & Strategic Finance

- **Designations:** CFA (Chartered Financial Analyst), CPA, CFP, FMVA
- **Strategic Finance:** Capital Allocation, Unit Economics, Treasury Management
- **Deal Experience:** Due Diligence, M&A Integration, Debt Financing

💡 Financial Analyst Resume Optimization Strategy

Prominently feature financial certifications (CFA Charterholder , CPA , CFA Level II Candidate) in your header and professional summary. Quantify achievements using portfolio sizes (\$500M+ budget), deal values (\$50M M&A transaction), or cost optimizations (\$1.5M opex savings).

2. PROVING FINANCIAL SKILLS WITH QUANTIFIABLE RESULTS

Skill Area	Key Keywords & Frameworks	How to Prove in Bullet Points
Financial Modeling & DCF	DCF Modeling, Valuation, WACC, Sensitivity Analysis	"Built dynamic 3-statement DCF model in Excel to evaluate \$45M target acquisition, presenting sensitivity analysis directly to Executive Board."
FP&A & Budgeting	Variance Analysis, Annual Budgeting, SAP, Anaplan	"Managed annual budgeting process for \$120M business unit across 6 departments, automating variance reports in Anaplan to save 10 hours monthly."
Cost Optimization & FP&A	Opex Reduction, EBITDA Margin, Working Capital	"Identified \$1.8M in vendor cost redundancies through detailed spend variance analysis, expanding FY25 operating margin by 140 bps."
Financial Data Analytics	SQL, Power BI, Financial Automation, Data Pipelines	"Queried SQL database to build automated Power BI executive dashboard tracking real-time EBITDA and cash flow metrics, replacing manual reporting."

3. ATS & FORMATTING BEST PRACTICES FOR FINANCE ROLES

✓ DO THIS

- Quantify dollar figures, budget sizes, and percentage impacts (`$100M+` Budget , `+180 bps` Margin).
- Specify exact financial modeling types (`3-Statement` , `DCF` , `LBO`).
- Name specific enterprise tools used (`SAP` , `Anaplan` , `Capital IQ` , `Power BI`).
- Highlight active credentials (`CFA` , `CPA` , `FMVA`).

✗ AVOID THIS

- Do not write generic claims like "proficient in Microsoft Excel" without advanced features.
- Avoid listing routine accounting entries without financial modeling context.
- Don't omit financial metric totals or company scale.
- Avoid vague statements like "assisted with budget" without detailing your exact contribution.