



BEFORE & AFTER — COMPLETE DELIVERABLE PAIR

Financial Analyst resume: the complete rewrite

Target: Senior Financial Analyst (FP&A) (US market). Seniority step shown: FP&A Analyst → Senior FP&A Analyst.

CONSTRUCTED EXAMPLE — "Marcus Chen" is a fictional candidate created to demonstrate our methodology, not a real client. Client materials are never published. Scenario: FP&A Analyst with 4 years in corporate finance, targeting Senior FP&A Analyst roles.

THE AFTER — the optimized resume

Marcus Chen

Chicago, IL · marcus.chen@example.com · (555) 076-2280

PROFESSIONAL SUMMARY

FP&A Analyst with 4 years building rolling forecasts, variance analysis, and driver-based models for a \$180M-revenue manufacturing division. CFA Level II Candidate; Financial Modeling & Valuation Analyst (FMVA), Corporate Finance Institute. Proficient in Anaplan, advanced Excel (Power Query, XLOOKUP), and SQL. Own monthly budget-vs-actual reporting across 9 cost centers and support annual planning for a 3-person FP&A team.

CREDENTIALS

CFA Level II Candidate (Level I passed) · Financial Modeling & Valuation Analyst (FMVA), Corporate Finance Institute

PROFESSIONAL EXPERIENCE

Financial Analyst, FP&A — Meridian Industrial Group · Jun 2022 – Present

- Built a driver-based rolling forecast in Anaplan covering \$120M of operating expense, cutting monthly variance-analysis turnaround from 5 days to 2.
- Developed a three-statement model with scenario and sensitivity analysis in Excel, informing a capital-allocation decision that redeployed \$8M toward the highest-margin product line.
- Automated budget-vs-actual reporting with SQL and Power BI dashboards across 9 cost centers, eliminating roughly 20 hours of manual Excel consolidation per close cycle.
- Co-author quarterly board-deck financials, translating variance drivers into plain-English commentary reviewed directly by the CFO.
- Support annual budgeting and headcount planning across the division as part of a 3-person FP&A team, coordinating inputs from 9 cost-center owners.

Finance Intern — Meridian Industrial Group · Jun 2021 – Aug 2021

- Built the P&L analysis workbook the team still uses for monthly KPI reporting; converted to a full-time offer.

SKILLS & TOOLS

Financial Planning & Analysis (FP&A) · Financial Analyst · Financial Modeling · Three-Statement Model · DCF · Variance Analysis · Budget vs. Actual · Scenario / Sensitivity Analysis · Rolling Forecast · Annual Budgeting · Driver-Based Planning · Headcount Planning · P&L Analysis · KPI Reporting · Advanced Excel (Power Query, XLOOKUP) · SQL · Power BI · Anaplan · SAP · CFA Level II Candidate · FMVA

EDUCATION

BBA Finance, University of Illinois — 2022

Both versions, through our ATS simulator

We ran the complete before and after through the same analysis engine as our free ATS simulator, against a realistic posting for "Senior Financial Analyst — FP&A". This is a simulation of how keyword-based parsing and screening behave in general — not a claim about any specific ATS, and not an "ATS score". Every number is computed from the documents by the simulator's own code and verified by our test suite — never typed in by hand.

ATS simulator result	Before	After
Robot record: fields extracted	7 of 8	8 of 8
Content lines lost (mapped to no field)	0	0
Weighted keyword coverage vs the posting	15%	74%
Simulated recruiter-search rank	#7 of 7	#2 of 7

What changed, and why

KEYWORDS & SEARCH

Summary: "motivated professional" → the scope you already own

"Motivated finance professional" describes every applicant in the stack. The rewrite states the function by its searched names ("FP&A Analyst", "Financial Planning & Analysis" lives in the skills line), the scale (\$180M-revenue division, 9 cost centers), the systems (Anaplan, SQL, advanced Excel) and honest credential status — "CFA Level II Candidate", never bare "CFA", which employers verify.

RECRUITER APPEAL

The seniority step: senior evidence, no title inflation

You cannot claim the Senior title before you hold it — but you can surface the senior-level evidence you already have: a forecast you own end-to-end, a model that informed an \$8M capital decision, automation that saved the team 20 hours per close, commentary reviewed by the CFO. That is what a hiring manager screening for Senior Analyst needs to see, and every word of it is checkable. The title line itself stays exactly what it is.

RECRUITER APPEAL

"Responsible for budgeting and forecasting" → the model, the scale, the speed

The before bullet names a duty; the rewrite names the artifact (driver-based rolling forecast in Anaplan), the scope (\$120M of operating expense) and the improvement (variance-analysis turnaround from 5 days to 2). "Driver-based", "rolling forecast" and "Anaplan" are all terms straight out of senior FP&A postings — present here because they are true, not because they are fashionable.

RECRUITER APPEAL

"Analyzed financial data" → a model that moved \$8M

"Analyzed financial data using Excel and other tools" is the FP&A equivalent of "responsible for patient care." The rewrite shows a three-statement model with scenario and sensitivity analysis — the exact modeling vocabulary recruiters search — attached to a consequence: a capital-allocation decision that redeployed \$8M. Analysis that informed a decision is senior evidence; analysis that produced a spreadsheet is not.

RECRUITER APPEAL

Month-end "assistance" → automation with a measured saving

"Assisted with month-end close process" is proximity, not contribution. The rewrite is specific about the mechanism (SQL + Power BI dashboards across 9 cost centers) and the payoff (roughly 20 hours of manual consolidation eliminated per cycle). Process improvement you can quantify is one of the clearest Analyst → Senior differentiators.

RECRUITER APPEAL

"Reports for senior management" → named audience, named artifact

Everyone prepares "reports for senior management." Co-authoring quarterly board-deck financials with commentary reviewed directly by the CFO tells a hiring manager the actual altitude of the work — and "board deck", "variance drivers" and "CFO" are the phrases their own posting uses for the senior role's presentation duties.

STRUCTURE & LAYOUT

Credentials: their own section, with honest status

CFA progress is one of the strongest filters in finance recruiting, and it was invisible in the before version. A dedicated section states it precisely — “CFA Level II Candidate” and “FMVA (Corporate Finance Institute)” — searchable, verifiable, and never overstated. Many ATS map this section straight into certification fields recruiters filter on.

KEYWORDS & SEARCH

Skills: name the disciplines and the systems

“Financial analysis · Budgeting · Forecasting” is too generic to match a senior search. The rewrite names the actual FP&A vocabulary (variance analysis, budget vs. actual, rolling forecast, driver-based planning, headcount planning, P&L analysis, KPI reporting) and every system by name (Anaplan, SAP, Power BI, SQL, Power Query). Tripling the legitimate keyword footprint without inventing a single skill.

ATS PARSING

Months on every date, tenure protected

The step to Senior usually carries a “4+ years” screen. Year-only ranges (“2022-present”) get tenure miscalculated often enough to matter at exactly this boundary. Adding months to every entry protects the experience calculation the filter runs on.

Explore this pair as an interactive annotated diff — hover any change to see why it was made — in the Samples section of our site.

THE BEFORE — the resume as it arrived

The complete original. Every highlighted weakness above refers to a line in this document. (Fictional, like the rest of this constructed example.)

Marcus Chen

Chicago, IL · marcus.chen@example.com · (555) 076-2280

PROFILE

Motivated finance professional with experience in budgeting and financial reporting. Strong analytical and communication skills, detail-oriented, looking for a new opportunity to grow my career in a dynamic company.

EXPERIENCE

Financial Analyst — Meridian Industrial Group (2022-present)

- Responsible for budgeting and forecasting for the division.
- Prepared financial reports for senior management.
- Analyzed financial data using Excel and other tools.
- Assisted with month-end close process.

Finance Intern — Meridian Industrial Group (summer 2021)

- Helped the finance team with various projects and data entry.

SKILLS

Financial analysis · Budgeting · Forecasting · Microsoft Excel · Communication · Teamwork

EDUCATION

BBA Finance, University of Illinois — 2022. Currently studying for CFA.

The keyword table for "Senior Financial Analyst (FP&A)"

From our research bank for Financial Analyst: the recruiter-search terms that matter for this title, and whether each version carries them. The after covers 22 of 34 (the before covered 1). The remaining gaps are deliberate: terms that would be untrue for this candidate stay out. We optimize with what is true, never past it.

Recruiter-search term	Before	After
TITLE VARIANTS		
Financial Analyst	✓	✓
Senior Financial Analyst	—	—
FP&A Analyst	—	✓
Financial Planning & Analysis	—	✓
Corporate Finance Analyst	—	—
CREDENTIALS		
CFA Level I / II	—	✓
CFA Charterholder	—	—
FMVA	—	✓
CPA	—	—
MBA (Finance)	—	—
MODELING & ANALYSIS		
Financial modeling	—	✓
Three-statement model	—	✓
DCF	—	✓
Variance analysis	—	✓

Recruiter-search term	Before	After
Budget vs. actual	—	✓
Scenario / sensitivity analysis	—	✓
PLANNING & FORECASTING		
Rolling forecast	—	✓
Annual budgeting	—	✓
Driver-based planning	—	✓
Headcount planning	—	✓
P&L analysis	—	✓
KPI reporting	—	✓
TOOLS & SYSTEMS		
Advanced Excel	—	✓
Power Query	—	—
SQL	—	✓
Power BI	—	✓
Tableau	—	—
Python	—	—
ERP & EPM PLATFORMS		
Anaplan	—	✓
Workday Adaptive Planning	—	—
Oracle Cloud EPM	—	—
SAP	—	✓
NetSuite	—	—
OneStream	—	—

Every change in this document maps to our published 12-point checking standard, applied to every delivered order.