

PROFESSIONAL SUMMARY

Senior FP&A analyst supporting a **\$310 million** business with direct experience in acquisition screening, scenario modeling, capital allocation, executive reporting, and cross-functional planning. Combines operating-finance depth with transaction-oriented analytical work.

PROFESSIONAL EXPERIENCE

Apex Consumer Holdings | Austin, TX

Jan 2025 - Present

Senior FP&A Analyst

- Own monthly forecast and annual plan for a **\$310 million** consumer-products division, consolidating input from 12 department leaders across revenue, gross margin, headcount, and capital spending.
- Built an acquisition-screening model for 28 category targets using growth, margin, channel mix, valuation, and strategic-fit criteria; advanced six companies for management review.
- Created a scenario model for a new distribution channel that identified a **\$6.8 million** EBITDA opportunity and informed a phased market launch.
- Reduced forecast-cycle time by two days by automating ERP extracts and standardizing variance bridges used in executive reviews.
- Built product and customer profitability views that isolated **\$4.5 million** of low-margin revenue and informed repricing and contract-renewal priorities.
- Prepared monthly executive materials linking operating KPIs to revenue, gross margin, EBITDA, cash flow, and forecast risk for the division president and CFO.

Apex Consumer Holdings | Austin, TX

Jul 2022 - Dec 2024

FP&A Analyst

- Produced monthly P&L and cash-flow reporting for five product lines and explained price, volume, mix, and cost variances to finance leadership.
- Supported **\$24 million** of capital requests by modeling payback, NPV, and sensitivity cases for operations investments.
- Built operating dashboards covering revenue, units, pricing, gross margin, inventory, and customer retention for monthly business reviews.
- Partnered with accounting during close to reconcile forecast-versus-actual differences and improve recurring data quality.

EDUCATION

Texas State University - McCoy College of Business

May 2022

B.B.A. Finance | GPA: 3.74/4.00; Honors College

SELECTED FINANCE PROJECT

Corporate Development Acquisition Case | Finance Leadership Program

Nov 2025

- Assessed a **\$65 million** adjacent-category target using market growth, strategic fit, synergy potential, valuation, and integration complexity.
- Built a five-year operating case and board recommendation comparing acquisition, partnership, and organic-entry alternatives.

TRAINING & CREDENTIALS

Completed corporate-finance training in capital budgeting, scenario modeling, acquisition screening, business-case development, Power BI, and executive presentation design.

LEADERSHIP & ACTIVITIES

Young Professionals Network; Apex Finance Academy - Excel Instructor

SKILLS & ADDITIONAL

Acquisition screening, valuation fundamentals, scenario modeling, budgeting, forecasting, Excel, Power BI, SAP, PowerPoint

INTERESTS

Trail running, live music, consumer brands, and bilingual community mentoring