KUSH PATEL

Financial Analyst | FP&A · Variance Analysis · Reconciliation & Close · Working Capital | Excel · Power BI · SQL · Python

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kushpatel29.github.io

Open to remote and relocation across Canada · Legally eligible to work in Canada · Available immediately

SUMMARY

- Financial-reporting and analytics professional with 4+ years across month-end GL/P&L reconciliation, risk reporting and distribution operations. Builds traceable margin, working-capital and close reporting in Excel, Power BI, SQL and Python.
- Public finance models include a utility variance bridge on official data, a synthetic distributor budget and three statements, and a dated DCF from SEC filings. These demonstrate modelling capability, separate from paid budgeting or investment ownership.

SKILLS

FP&A & Modelling (project evidence): annual budget cycle (top-down targets, bottom-up submissions, challenge round, monthly phasing), three-statement models with a revolver, 3+9 reforecasts, budget versus actual and variance bridges, price-volume-mix, driver-based forecasts with backtests, scenarios, five-year operating and capital plans; DCF valuation with WACC and terminal-value sensitivities (project)

Close & Controls: GL/P&L and subledger reconciliation, journal-entry testing, segregation of duties, control totals, exception logs, close certification with named reviewers

Working Capital & Margin: AP and AR aging, DSO and DPO, invoice-match exceptions, credit exposure, COGS and gross margin, pocket-price waterfalls, inventory valuation

Excel: Power Query, Power Pivot / DAX, dynamic arrays, LAMBDA, data tables, LINEST, formula-driven models that tie out to a reporting layer

Reporting & Data: Power BI (DAX, RLS), Tableau, SQL (T-SQL), Python (pandas), Microsoft Fabric, SSRS paginated reports

PROFESSIONAL EXPERIENCE

Two Rivers Specialty Meats

Dec 2023 – Jun 2026 · North Vancouver, BC

Data Analyst — Operations, Logistics & Enterprise Reporting

- Built source-to-mart GL/P&L and inventory controls, cutting discrepancies an estimated ~45% and reporting errors ~30% (internal directional estimates, not audited).
- Defined revenue, COGS and gross-margin KPIs with Finance and Sales for monthly variance and margin reviews.
- Delivered AP/AR aging, DPO/DSO, invoice-match exceptions and credit-exposure reporting for Finance.
- Owned Power BI semantic models, DAX measures and drill-through finance/operations reports secured with RLS and column masking.
- As sole analyst, integrated ERP, Square POS, workforce and REST feeds into Bronze/Silver/Gold datasets using Microsoft Fabric, Azure Data Factory/Synapse, SQL and PySpark.

Shivam Investments

Dec 2020 – Jul 2022 · Vadodara, India (hybrid)

Financial Analyst — Data & Reporting

- Gathered requirements from portfolio and risk stakeholders; delivered Power BI dashboards with auditable measure definitions and reconciled GL/P&L figures across sources.
- Automated recurring preparation with Python and SQL views, replacing spreadsheet consolidation and cutting manual effort an estimated ~40% (internal directional estimate).

SELECTED PROJECTS — public models and code; synthetic data is labelled

Finance Decision Models in Excel and Power BI — Excel, Power Query, Power Pivot / DAX, Power BI · real public data
github.com/KushPatel29/excel-fpa-model · workbook: PGE_Utility_FPA_Model.xlsx
Variance on public filings: Portland General Electric's H1 2026 revenue $100.9M below an independently modelled plan, split into weather, price and usage from EIA, FERC and NOAA data with an exact variance bridge and a four-year load-forecast backtest, published in Excel and a seven-page Power BI report that agree to the cent. Beside it, a synthetic distributor model for price-volume-mix and working capital, and that distributor's FY2027 budget cycle: bottom-up EBITDA lands $926K short of target, a challenge round closes $335K, the rest needs 1.28% more price; three linked monthly statements balance every month; a 3+9 reforecast bridges a $671K miss.

GL / P&L Reconciliation — T-SQL, SQLite, Power BI, Tableau · synthetic data
github.com/KushPatel29/gl-reconciliation-dashboard
A close that will not fake its sign-offs: a close-certification engine tests all 5,400 journal entries and enforces segregation of duties. At month-end 8 of 60 account-periods certify, 9 go to a named reviewer and 43 are blocked; no approval is invented to make the close look finished.

Pricing & Costing Analytics — Python, DuckDB, Power BI, Streamlit · synthetic data
github.com/KushPatel29/pricing-costing-analytics · live: cost-to-price-calculator.streamlit.app
Margin leakage, priced: a pocket-price waterfall shows 18.2% of list price never arriving, ranks which points to recover, and routes each price change to the person who must approve it.

B.C. Local-Government Finance — Excel, Power Query, dbt / DuckDB, Python · real public data
github.com/KushPatel29/bc-local-government-finance
Public-sector budgeting: a five-year plan for any of 161 B.C. municipalities covering tax increases, borrowing under the legal limit and reserves; for Fernie, closing the infrastructure renewal gap by 2029 needs 3.7% a year. Across the province, the 68 municipalities investing below renewal need are $570M a year short.

GrowthOps OS — Excel, Power BI (DAX), SQL, dbt · synthetic data
github.com/KushPatel29/GrowthOps-OS · live: growthops-os.streamlit.app
Revenue reconciliation: ad platforms claimed $3.72M; the business collected $3.06M. Two bridges explain every dollar between them, and a formula-driven Excel workbook and a Power BI report reach the same answer independently.

lululemon DCF - Excel, Python · real SEC filings
github.com/KushPatel29/excel-fpa-model/tree/main/valuation
Valuation project: lululemon DCF from SEC filings: five-year forecasts, bear/base/bull cases and a WACC/growth sensitivity grid; formula outputs held to a Python model. Educational valuation, not paid investment analysis.

Revenue-to-cash reconciliation and further finance evidence at kushpatel29.github.io. Valuation is educational, not paid investment analysis.

EDUCATION

Northeastern University — Master of Professional Studies in Analytics (Applied Machine Intelligence), GPA 3.76/4.0 · Vancouver, BC — **Sep 2022 – Jun 2024**

Gujarat Technological University — Bachelor of Engineering, Computer Science · India — **Aug 2017 – Aug 2021**

CERTIFICATIONS

Google Data Analytics Professional Certificate · UC Davis SQL for Data Science · IBM Python for Data Science, AI & Development · Databricks Fundamentals.