Marcus T. Ellington | Financial Analyst | FP&A, Valuation, and Data-Driven Forecasting

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Basics

- Financial analyst with 6+ years of experience in FP&A, investment research, and financial modeling across technology and consumer sectors
- Skilled at building driver-based forecasts, analyzing variances, and translating complex data into clear recommendations for senior leadership
- Proven record of improving forecast accuracy, automating recurring reporting, and partnering with cross-functional teams to support strategic decisions
- Comfortable working across the full analytics stack, from SQL and Python analysis to executive-ready dashboards and investment memos

Education

University of California, Berkeley **https://www.berkeley.edu**
Bachelor, Economics, Score: 3.9/4.0 *Aug 2014–May 2018*

- Built a strong foundation in valuation, accounting, and quantitative analysis
- Completed capstone research on capital structure decisions in technology firms
- Developed proficiency in Excel, Python, and statistical modeling through coursework and projects

Courses: Corporate Finance, Financial Accounting, Econometrics, Investments, Microeconomic Theory, Data Analysis with Python, Business Valuation, Risk Management

Boston College **https://www.bc.edu**
Master, Finance, Score: 3.8/4.0 *Aug 2018–May 2019*

- Focused on corporate finance, valuation, and investment analysis
- Completed a practicum valuing a mid-cap SaaS company using DCF and comparable company analysis
- Collaborated with a five-person team to present investment recommendations to faculty and industry judges

Courses: Financial Modeling, Investment Analysis, Corporate Valuation, Econometrics, Portfolio Management

Work

Alder Ridge Capital **https://www.alderridgecapital.com**
Senior Financial Analyst *Jun 2021–Present*

- Lead FP&A for a $180M revenue portfolio, owning monthly forecasts, annual budgets, and long-range plans for three business units
- Build and maintain three-statement models, scenario analyses, and KPI dashboards used by the CFO and investment committee
- Improved forecast accuracy from ±12% to ±4% by redesigning driver-based revenue and headcount models
- Automate recurring reporting with SQL, Python, and Power BI, reducing close-cycle reporting time by 10 hours per month
- Partner with sales, product, and accounting teams to explain variances and support pricing, hiring, and investment decisions

Keywords: FP&A, Forecasting, Three-Statement Modeling, Variance Analysis, Power BI

Northstar Equity Research **https://www.northstarequityresearch.com**
Financial Analyst *Jul 2019–May 2021*

- Conducted equity research and valuation for mid-cap technology and consumer companies, supporting a $2.4B AUM portfolio
- Built DCF, comparable company, and precedent transaction models; prepared investment memos and quarterly earnings reviews
- Analyzed results, updated estimates, and communicated risks and catalysts to portfolio managers and research leadership
- Maintained sector databases and automated data pulls using Python and Excel VBA

Keywords: Equity Research, Valuation, DCF Modeling, Earnings Analysis, Excel VBA

Languages

English: Native or Bilingual Proficiency

Spanish: Full Professional Proficiency **Keywords**: Financial reporting, Client presentations

Skills

Financial Modeling: Expert **Keywords**: Three-Statement Modeling, DCF, Comparable Companies, Scenario Analysis, Budgeting

Data Analysis: Advanced **Keywords**: SQL, Python, Pandas, Power BI, Tableau, Excel VBA

FP&A: Advanced **Keywords**: Forecasting, Variance Analysis, KPI Reporting, Headcount Planning, Long-Range Planning

Communication: Expert **Keywords**: Executive Presentations, Cross-Functional Collaboration, Investment Memos, Stakeholder Management

Awards

Outstanding Graduate Student Award

Boston College *May 2019*

Awarded to the top graduating student in the Master of Finance program for academic excellence and leadership in collaborative coursework.

Certificates

Financial Modeling & Valuation Analyst (FMVA) **https://corporatefinanceinstitute.com/certifications/fmva/**

Corporate Finance Institute *Mar 2022*

Microsoft Certified: Data Analyst Associatehttps://learn.microsoft.com/en-us/credentials/certifications/data-analyst-associate/

Microsoft *Jan 2023*

Publications

Finance Leadership Journal **https://www.financeleadershipjournal.com/articles/driver-based-planning**

Improving Forecast Accuracy with Driver-Based Planning *Oct 2023*

- Article covering practical approaches to driver-based forecasting, variance analysis, and forecast governance
- Draws on experience redesigning revenue and headcount models for a multi-business-unit portfolio

Projects

Revenue Forecasting Dashboard **https://github.com/marcus-ellington/re**

Interactive dashboard for monitoring revenue drivers, forecast accuracy, and variance explanations.

- Built a Power BI dashboard connected to SQL models to track bookings, pipeline, and revenue by segment
- Added variance views that let finance and sales leaders drill into forecast misses by region and product
- Reduced manual variance commentary preparation from two days to under four hours

Keywords: Power BI, SQL, Forecasting, Variance Analysis

SaaS Benchmarking Model **https://github.com/marcus-**

Python and Excel model for benchmarking SaaS growth, retention, and margin metrics across public companies.

- Collected and normalized public-company data for 40+ SaaS businesses
- Calculated growth, gross margin, net revenue retention, and rule-of-40 metrics for comparative analysis
- Presented findings on operating efficiency and growth durability to an internal research team

Keywords: SaaS Metrics, Python, Excel, Benchmarking

Interests

Investing: Value Investing, ETF Research, Personal Finance

Outdoors: Trail Running, Cycling, Photography

Volunteer

Bay Area Financial Literacy Coalition **https://www.bayareafinancialliteracy.org**

Volunteer Financial Coach *Sep 2020–Present*

- Coach low-income households on budgeting, debt reduction, and savings strategies through monthly one-on-one sessions
- Develop plain-language workshop materials on credit, banking, and retirement basics
- Track participant progress and adapt coaching plans to individual financial goals