# Rachel Feldman

## Financial Analyst II · FP&A, Manufacturing

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### SUMMARY

Financial analyst with 7 years in corporate FP&A at a manufacturer and a freight carrier. Builds driver-based budgets and rolling forecasts in Adaptive Planning and Excel, and writes the monthly price, volume and mix bridges plant and finance leaders use to explain results.

### EXPERIENCE

**Financial Analyst II, FP&A** · Catawba Industrial Products — Apr 2022 – Present

Charlotte, NC

- Built the driver-based 2026 operating budget in Workday Adaptive Planning for 3 plants and $418M in revenue, replacing 40 linked Excel files.
- Produced the monthly variance package for the CFO: price, volume, mix and material cost bridges by plant, delivered by workday 6.
- Caught a $1.9M freight accrual shortfall during a Q3 forecast review, traced to a carrier rate increase missing from standard cost.
- Wrote the capital request template and NPV and IRR reviews for 14 equipment projects totaling $11.2M; 2 were deferred on payback.
- Rebuilt the 13-week cash forecast in Power BI from NetSuite and bank data, cutting average weekly forecast error from 9% to 3%.

**Financial Analyst** · Piedmont Freight Logistics — Jul 2019 – Mar 2022

Charlotte, NC

- Prepared monthly lane profitability reports for 220 shipper accounts; sales used them to reprice 31 lanes running below cost.
- Pulled GL and TMS data with SQL for a lease versus buy analysis on 60 tractors, presented to the VP of Operations.
- Handled month-end accruals and balance sheet reconciliations for 4 terminal cost centers during the first 18 months.

### EDUCATION

**B.S.B.A. Finance, minor in Economics** · The Ohio State University, Fisher College of Business — May 2019

### SKILLS

**Planning & Analysis:** Annual budget, Rolling forecast, Variance analysis, Standard cost, Capex review (NPV, IRR, payback), 13-week cash forecast

**Systems:** Workday Adaptive Planning, NetSuite, Power BI, SQL, Excel (XLOOKUP, Power Query, pivot tables)

### CERTIFICATIONS

CFA Level I, passed (CFA Institute, 2021)