JULIAN MERCER

FINANCIAL CONSULTANT

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PROFESSIONAL SUMMARY

Financial Consultant with 8+ years in financial analysis, valuation, and risk assessment for corporate and private-equity clients. Builds models executives rely on, tightens forecasting and controls, and explains financial trade-offs in plain language.

PROFESSIONAL EXPERIENCE

Senior Financial Consultant Jan 2022 - Present
KPMG, Boston, MA

- Built an integrated three-statement model for a $300M healthcare services buyer, supporting a bid that closed within the approved range.
- Performed financial due diligence on four targets, uncovering $5.6M of normalised earnings adjustments that changed the offer price.
- Redesigned a monthly forecasting process with finance leaders, bringing variance to plan from 9% down to 4% within two quarters.
- Assessed credit and liquidity risk for a manufacturer, recommending covenant headroom actions that avoided a lender waiver.
- Created a rolling 13-week cash flow tool in Excel that gave the treasurer weekly visibility and released $2.1M in working capital.
- Supervised three analysts on model reviews and checklists, reducing formula errors found in senior review by about half.

Financial Consultant Jul 2018 - Dec 2021
Grant Thornton, Chicago, IL

- Valued minority stakes in private companies using discounted cash flow and market comparables, supporting 22 client reports.
- Tested internal controls over financial reporting at five mid-sized clients, documenting findings leadership remediated within a quarter.
- Analysed product-line profitability for a distributor and flagged $1.4M of unrecovered shipping cost that finance then repriced.
- Prepared board-ready budgeting packs with scenario views, helping two clients agree capital plans on the first review.

Financial Analyst Jun 2016 - Jun 2018
Wells Fargo, Charlotte, NC

- Reviewed commercial loan files and financial statements, writing risk ratings that credit officers used for 60 renewals.
- Built quarterly portfolio reports tracking delinquency and concentration, replacing a manual process that took three days.
- Reconciled general ledger accounts monthly and resolved variances above threshold, keeping the close on schedule every period.

CORE SKILLS

Financial analysis | Financial modelling | Valuation | Due diligence | Risk assessment | Cash flow forecasting | Budgeting and forecasting | Variance analysis | Credit analysis | Internal controls | Working capital management | Scenario analysis | Advanced Excel | Power BI | Board reporting | Stakeholder communication

EDUCATION

B.S. in Finance, Boston College, Chestnut Hill, MA

CERTIFICATIONS

CFA Level II Candidate | Certified Public Accountant (CPA) | Financial Modeling and Valuation Analyst (FMVA)