



<b>Position Title</b>		<b>Division</b>
Senior Financial Analyst		Finance & Administration
<b>Reports To:</b>	<b>Department</b>	<b>Date</b>
EVP, Chief Financial Officer	Finance	January 24, 2023
<b>Supervises</b>	<b>FLSA</b>	<b>Revised</b>
N/A	Exempt	

**GENERAL SUMMARY**

This position is responsible for providing comprehensive financial analysis support to the Chief Financial Officer. Responsibilities will include producing quarterly product profitability reports and peer analysis as well as other industry analysis. This person will analyze internal financial data and develop insights that assist in making business decisions. The ability to work with data and develop financial models is essential and will work with Sr. Management to produce Capital Budgeting analysis for new projects as well as support for other ad-hoc financial analysis. This position will also assist with development of executive presentations, including annual budget.

**MAJOR RESPONSIBILITIES** *(in descending order of importance and should be no more than 10, if possible)*

1. Manage Product Profitability process, including funds transfer pricing and cost allocation as well as produce quarterly reports for Sr. Management.
2. Produce quarterly peer analysis for Sr. Management.
3. Partners with departments to assist with Capital Budgeting analysis for new projects.
4. Leverage financial applications to proactively develop analysis to improve financial performance.
5. Assists CFO in the development of presentations.
6. Performs other ad-hoc finance project duties as assigned by the EVP, Chief Financial Officer.

**QUALIFICATIONS:**

*Education*

BA/BS degree in Accounting or Finance.

Master’s Degree in Business Administration (MBA) Accounting, Finance, or Economics is preferred.

*Experience/Skills/Knowledge:*

1. At least 3 years previous experience as a financial analyst is required, preferably in a credit union, bank or public accounting firm dealing with financial institutions.
2. Demonstrated knowledge of financial modeling and analysis is required.
3. Exceptional ability to develop Board & Executive level presentations.
4. Advanced Microsoft Excel and PowerPoint skills. Other BI applications are a plus.
5. Experience working with data.
6. Knowledge of S&P Global Market Intelligence and Axiom is preferred.

- 7. Excellent organizational, analytical and problem-solving skills.
- 8. Ability to handle multiple projects/priorities simultaneously with an effective outcome.
- 9. Excellent verbal, written, telephone and interpersonal communication skills.
- 10. Ability to function in a financial institution environment and utilize standard office equipment including but not limited to: fax, copier, telephone, etc. Some travel required. Ability to lift a minimum of 25lbs. e.g. file boxes

**GENERAL DESCRIPTION:**

*In terms of physical requirements, this position requires work best described as:*

- Sedentary    Light    Medium    Heavy    Very Heavy

**PHYSICAL TASKS:**

- Standing/Walking/Bending/Stooping – Frequent
- Hearing - Ability to receive information through oral communication (face to face and telephone). - Continuous
- Talking - Expressing or exchanging ideas by means of the spoken word (face to face and telephone). – Continuous
- Reading – Ability to receive information through fax, e-mail and text messages – Continuous

**AUDIO / VISUAL:**

- Requires vision to perform work dealing with data and figures and computer screens. - Continuous

**PSYCHOLOGICAL/MENTAL DEMANDS:**

- Responds positively and productively to stressful (internal and external) member situations - Continuous
- Assists others to work harmoniously and effectively as part of a work team. – Continuous

<b>Employee’s Signature</b>		<b>Date</b>	
<b>Manager’s Signature</b>		<b>Date</b>	
<b>Human Resources’ Signature</b>		<b>Date</b>	