Financial Analyst

Summary:

Provide client financial and data analysis support to project leads and other team members. A fast paced and dynamic work environment with new things to learn and problems to solve each day. Duties can be complex in nature and may involve access to confidential and/or sensitive information. Efficient and accurate work with a high degree of confidentiality and professionalism is a must.

The ideal candidate is a highly motivated self-starter who has a passion for data, analysis, problem solving, and serving our clients. Must enjoy data, financial analysis, and helping clients understand what the data means to their business.

General Responsibilities

- Perform financial forecasting, reporting, and operational metrics tracking.
- Analyze financial data and create financial models for decision support.
- Report on financial performance and prepare for regular client reviews.
- Troubleshoot data issues.
- Establish and maintain personal rapport with clients in all departments and at all levels of the organization.
- Participate in client and prospective client meetings.
- Maintain company systems with the most up to date information.
- Adherence to all company policies and procedures.
- Assist with business development efforts.
- Other duties as assigned.

Specific Responsibilities

In conjunction with a Managing Director or project lead:

- Collect and analyze financial performance and develop forecast models.
- Evaluate financial performance by comparing and analyzing actual results with plans and forecasts.
- Develop complex sales forecasting models.
- Analyze past results, perform variance analysis, identify trends, and make recommendations.
- Assist in the preparation of financial and business reports.
- Recommend actions by analyzing and interpreting complex data sets and making comparative analyses.
- Identify and drive process improvements including but not limited to creation of standard and ad-hoc reports, tools, and dashboards.
- Increase productivity by developing templates and/or automated reporting forecasting tools.
- Perform market research, data mining, business intelligence, and related research.
- Distill information into presentation materials through data visualization and storytelling methodologies using PowerPoint or similar presentation platforms for the benefit of both clients and prospective clients.

Kowledge and Education

- Bachelor's degree in data science, finance, or accounting.
- Understanding of Generally Accepted Accounting Principles.

Work Experience

- 3+ years of proven experience working in the field of data analytics, finance, or accounting.

Skills and Competencies

- Strong financial knowledge, analytical mindset, and problem-solving skills.
- Able to read and understand standard financial reports required.
- Understanding of pricing and costing best practices preferred.
- Highly skilled in MS Excel with the ability to write and use complex formulas, macros, VB programing language, and other advanced skills.
- SQL knowledge and experience working with relational databases, query authoring, as well as familiarity with a variety of databases is a plus.
- Tableau or Power BI experience is a plus.
- Excellent attention to detail & accuracy.
- Ability to work independently.
- Excellent interpersonal and communication skills (verbal and written).
- Excellent organization and prioritization skills.
- Knowledge of manufacturing, distribution, and industrial services is a plus.

Work Environment

- Hybrid: virtual and office.
- Duties include but are not limited to: stand, walk, twist, bend, lift, see, talk, and hear.

Additional Information

- Must pass background check and drug test.
- Must have a valid driver's license in good standing.
- Ability to travel domestically (10-25% of the time), including overnight as required.
- Hours of work required: 40+ hours typical, subject to work demands.
- Days of work week: Monday-Friday is typical. Some weekend work may be required.
- The above statements are intended to describe the general nature and level of work performed for this position. They are not intended to be an exhaustive list of all responsibilities, duties, qualifications, or working conditions.