

Financial Analyst Job Listing

Summary/Objective:

We are looking for a skilled Financial Analyst to maintain financial records, including purchases, sales, receipts, and payments. Job duties include working closely with our accounting team to create and analyze financial reports and ensure legal requirements compliance. The role involves working with multiple clients in various industries and managing large volumes of transactions efficiently and accurately. The role requires out of the box thinking through financial situations, streamlining expenses, and preparing financial statements.

Essential Functions:

- Prepare and Analyze Financial Statements (Profit & Loss, Balance Sheet, Cash Flow)
- Analyze Actual Financials in Comparison to Budget & Forecast
- Maintain Budget in Accounting Software
- Provide Weekly Reports for Management Review
- Assist with Key Performance Indicator Data and Review for Sales, Customer Service, and Finance Team
- Track Project Budgets and Prepare Reports for Management
- Calculate Performance-Based Bonuses for Team
- Work Closely with CPA to Prepare Financial Information
- Complete Tax Forms as Needed
- Maintain Historical Records for Compliance
- Administer all Projects in Project Management and Software Systems
- Assist in Client Invoicing
- Contribute to Team Goals and Project Completion in a Timely Manner

Additional Functions:

- Update and categorize transactions through bank feeds or manual import
- Develop bookkeeping processes and procedures to ensure accuracy
- Troubleshoot errors within the accounting system
- Balance general ledger by completing reconciliations
- Review and analyze trends
- Calculate and process payroll timely and accurately
- Work closely with Project Managers to assist in financial matters

Professional Skills:

- Analytical decision-making skills
- Proactive communicator

- Driven and self-motivated
- Highly organized and detail oriented
- Excellent written communication skills
- Approachable and professional
- Expertise in customer service
- Teamwork oriented
- Highly efficient time management skills
- An active learner who loves finding ways to improve your skills.
- Must be flexible and adaptable in order to anticipate changing needs and interests.
- Be comfortable working in a fast-paced environment

Required Technical Skills:

- Proven ability to calculate, post and manage accounting figures and financial records
- Data entry skills along with a knack for numbers
- Hands-on experience with spreadsheets and accounting and payroll software(s) (Quickbooks Online, Xero, Wave, Freshbooks, Intuit Payroll, Gusto)
- Quickbooks Online ProAdvisor Certification
- Advanced knowledge of Microsoft Office (Word, PowerPoint, and Excel); scheduling appointments/updating calendars
- Knowledge of excel formulas and functions including vlookups, hlookups, sumifs, sumproducts, and pivot tables
- Experience with Google Suite Apps, cloud services, and other technology tools
- Strong Internet connection is required, along with experience using communication tools like Zoom
- Familiarity with HubSpot or other CRM web-based tracking systems

Education and Experience:

- BS degree in Finance, Accounting or Business Administration with 1+ years of experience
- Working knowledge of excel formulas and functions including vlookups, hlookups, sumifs, sumproducts, and pivot tables
- Quickbooks Online ProAdvisor Certification, or able to acquire certification within 12 weeks of hire date.

Additional Information

Supervisory Responsibility: This position has no supervisory responsibilities.

Work Environment: This job operates in a virtual, office setting. This position is primarily sedentary in a climate controlled office with little exposure to environmental hazards.

Physical Demands: The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. This is largely a sedentary role. The employee is frequently required to sit for long periods of time.

Position Type and Expected Hours of Work: This is an hourly, contract position. Days and hours of work are Monday through Friday, 8:30 a.m. to 5 p.m. Occasional evening and weekend work may be required as job duties demand.

Other Duties: Please note this job listing is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities, and activities may change at any time with or without notice.