

Sr. Financial Analyst

Job Listing

Summary/Objective:

We are looking for a skilled Sr. Financial Analyst to maintain financial records, including purchases, sales, receipts, and payments. Job duties include leading our financial team to creating and analyzing 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 accounting system
- Balance general ledger by completing reconciliations
- Review and analyze trends
- Complete tax forms as needed
- Maintain historical records for compliance
- Calculate and process payroll timely and accurately
- Work closely with Project Managers to assist in financial matters

Professional Skills:

- Leadership and decision making skills
- Effective communicator. Listen, learn, and engage with customers and co-workers.
- 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:

- Advanced user of spreadsheets and accounting and payroll softwares (Quickbooks Online, Xero, Wave, Freshbooks, Intuit Payroll, Gusto)
- Advanced knowledge of Microsoft Office (Word, PowerPoint, and Excel); scheduling appointments/updating calendars
- Expert 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 3+ years of experience
- 3 or more years of experience working with excel formulas and functions including vlookups, hlookups, sumifs, sumproducts, and pivot tables
- Quickbooks Online ProAdvisor Certification

Additional Information

Supervisory Responsibility: This position will lead the finance team.

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 flexible Monday through Friday, 8:30 a.m. to 5 p.m. This is not a 40 hour a week position. 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.