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# Example of Financial Planning Associate Job Description

Our innovative and growing company is hiring for a financial planning associate. Please review the list of responsibilities and qualifications. While this is our ideal list, we will consider candidates that do not necessarily have all of the qualifications, but have sufficient experience and talent.

## Responsibilities for financial planning associate

* Support manager and colleagues in looking across the business lines to identify common trends, perform analysis, and articulate options and financial impacts
* Participate in the process of allocating Shared Service costs to Business Units
* Building the financial planning, reporting, and analysis infrastructure for the Business, including budgeting processes and reconciliation to actual financial results, measurement and tracking of expenses incurred, and financial forecasting and modeling
* Interfacing with GS internal groups on FTP, capital allocation and NII measurements for the business
* Preparing financial reports and monitoring the financial performance of the business
* Incorporating regulatory capital modeling for the Business under CCAR, Basel III Standardized, Basel III Advanced, and GS internal approaches into broader financial planning, in conjunction with a designated team of GS internal professionals
* Develop detailed financial planning models, liaising closely with our two core businesses in Financial Services and Eight Roads to drive high quality decision making and closely monitor business and Firm performance
* Produce ad hoc analysis to drive key strategic business decisions for the senior leadership
* Facilitate consolidation of data from business facing FP&A teams for firm wide reporting through creation of management and standard reporting templates
* Partner closely with the business facing FP&A teams, Planning & Strategy, Treasury and the Group Finance teams

## Qualifications for financial planning associate

* Analyze and validate departmental spending, identifying risks and opportunities for improvement
* Facilitate monthly closing process by providing department-level reporting to allow for review and explanation of variances
* Lead development and formulation of annual operating budgets across
* Support department management with development and formulation of project budgets as needed
* Develop financial models and analyses to support strategic initiatives and cash flow planning across
* Experience with EMoney or financial planning software a plus