Downloaded from <https://www.velvetjobs.com/job-descriptions/financial-professional>

# Example of Financial Professional Job Description

Our company is looking to fill the role of financial professional. Thank you in advance for taking a look at the list of responsibilities and qualifications. We look forward to reviewing your resume.

## Responsibilities for financial professional

* Time value of money
* Prospecting and telephone techniques (if you become FINRA licensed)
* Maintaining material master data in SAP
* Assisting in preparation of P&Ls for new product launches
* Participating in monthly business planning meetings
* Responsible for performing a myriad of analytical duties associated with the revenue forecasting process
* Prepare, reconcile, and review weekly fluctuations for revenue accounts
* Active participation in month end close activities by ensuring sales/revenue transactions are recorded accurately
* Partner with leadership to develop and monitor margin improvement strategies
* Work with Account Managers to track margin on a weekly basis and manage appropriate yield controls to maximize margin

## Qualifications for financial professional

* Analytical skills, advanced user in Excel
* Proven experience in Finance department
* Local language skills ( fluent level ) required
* Ensure the control environment and compliance is in line with local regulations and internal guidelines
* On the other hand, provide support to the Team Leader and the Head of Finance, in decision-making by providing timely and relevant financial information with due analysis of all parties
* Coordinate the relationship with financial institutions and financial brokers