Downloaded from <https://www.velvetjobs.com/job-descriptions/specialist-planning>

# Example of Specialist, Planning Job Description

Our company is searching for experienced candidates for the position of specialist, planning. If you are looking for an exciting place to work, please take a look at the list of qualifications below.

## Responsibilities for specialist, planning

* Prepare comprehensive financial plans that meet client’s specific needs in the areas of financial, investment, retirement, and risk management planning
* Quarterly analysis of static pool trends for lease portfolio including remarketing channel distribution, early term behavior, Dealer Channel premium, Auction Expense, and other behavior specific to forecasting lease account performance
* Collaboration with Statistical Modeling team to ensure econometric aspects are accounted for in the Residual Value model
* May serves as back-up on logging financial plans received
* Coordinates maintenance flying schedule
* Monitor Inventory levels vs
* Review and assist the planner in generating the master production schedules, running Kinaxis can do simulation
* Conduct one-on-one, financial planning client case reviews
* Provide centralized, customized support to Financial Advisors on analyzing financial plan modeling needs after reviewing input and calculated information at the client level through LiveMeeting training sessions
* Plan and implement specific programs and projects including project management for university wide Workforce Planning initiative

## Qualifications for specialist, planning

* Bachelor Degree in Economics, Political Science or Engineering
* Fluency in Italian and English (both written and spoken), French knowledge would be an advantage
* The incumbent’s level of skill and knowledge is sufficient to ensure “value added” in terms of advice, guidance, quality control, coordination
* Computer proficient in AutoCAD
* A minimum of 3-5 years retail banking & Customer Marketing Experience
* A B Degree in Commerce or equivalent NQF 6 level qualification