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# Example of Staff Financial Analyst Job Description

Our innovative and growing company is hiring for a staff financial analyst. 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 staff financial analyst

* Analyzing financial situations with the guidance from financial advisors, reviewing client accounts and product solutions
* Producing charts, graphs, and informational guides to act as visual aids to help the advisor educate and inform clients
* Preparing the agenda and PowerPoint presentation of the information to the client including producing financial reports (Account Snapshots, Illustrations, & Fact Sheets)
* Gathering and analyzing client data
* Reviewing and entering client data to planning software
* Developing preliminary recommendations
* Reviewing case opportunity, and evaluating implemented recommendations for applicability
* Providing goal tracking, review, and updating recommendations through renewal planning
* Drafting client deliverables with guidance from the financial advisor
* Responsible for month-end close process, including completion of financial reporting package and supporting schedules for operational management and corporate

## Qualifications for staff financial analyst

* 3-4 years experience in Finance and Accounting field
* Possesses advanced knowledge of desktop analytical, spreadsheet tools (MS Office - Word, Excel, Power Point) and be able to use them to construct in-depth performance analysis
* Able to write clear concise, and informative reports and messages
* Uses creativity and judgment to recognize problems and issues which are frequently beyond the scope of established procedures and practice
* Works on special projects related to financial plans, budgets, and forecasts
* Has impact on tactical and strategic financial results within local area