Example of Financial Assistant Job Description

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Our innovative and growing company is looking for a financial assistant. If you are looking for an exciting place to work, please take a look at the list of qualifications below.

Responsibilities for financial assistant

- Interface daily with project manager and project delivery team
- Participate in project review preparation, execution, and follow up as agreed with Project Manager and Review team
- Support End Market Finance Lead in monthly close activities as outlined by Africa Financial Management team
- Assist in the preparation of the project risk analysis and revenue authorization requests
- Work proactively over the month to clear project financial issues in APIC
- Assist to prepare budget and maintain controls on spending to ensure budgetary limits are met
- Administrative tasks include copying, departmental mailings, assisting in file management (to include but limited to filing, archiving, purging,) and assisting with other miscellaneous office tasks as needed
- Work requires the exercise of considerable judgment to ensure that transactions are in accordance with policies, procedures, and regulations
- Work with departmental personnel, other university departments, and vendors to resolve problems associated with departmental accounting functions, as requested by departmental managers
- Serve as back-up office receptionist for the department, participate in departmental events, and assist with administrative tasks including copying, departmental mailings, filing, and other miscellaneous office tasks as needed

Qualifications for financial assistant

- Reconciliation of the balance sheet as part of month end processes fixed assets, inventory, bank, inter-company, accounts payable and receivable, payroll, Reconciling and filing of VAT returns and purchasing control
- Interest in personal finance and/or the financial planning or investment fields
- Ability and previous experience in client service and support – finding out what clients need and taking initiative to increase client satisfaction
- Experience in some financial planning, analysis and database software such as Naviplan™, Money Guide Pro™, eMoney™, Morningstar™, ProTracker™ -- is a plus but not required
- Securities and insurance licenses not needed
- Provide assistance with credit card issues to various departments across the business