



# Example of Financial Management Group Job Description

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Our growing company is hiring for a financial management group. To join our growing team, please review the list of responsibilities and qualifications.

## Responsibilities for financial management group

- Complete ad-hoc requests/analysis
- Oversees and provides operational framework guidance on Middle Office policies between front and back office operations
- Lead the monthly forecasting and planning process for SG IBG Ops and ensure compliance to the financial KPIs
- Drive the annual budgeting exercise and manage the related follow-up activities for SG IBG Ops
- Monitor, track and ensure quality reporting on the status of productivity saves on a monthly basis
- Prepare and analyze monthly MTK, headcount and financial reports, any internal management reports
- Support in various report automation and programming effort within the department
- Provide secondary support in various people initiatives under CARE and Employee Engagement programs, where necessary
- Underwriting and analyzing new and renewal business
- Coaching and guiding a team of Underwriters

## Qualifications for financial management group

- Preparation of federal and state returns sales and use tax returns
- Proven experience in a similar role either within the business, legal, compliance department or within a regulator in relation to asset management

- 5 to 7 years of relevant experience or similar experience in Finance/Business Management
- Degree holder in Business Administration, Finance or related disciplines
- Minimum 2 years of sales or marketing experience in financial institutions, with proven track record in selling insurance products