



Example of Financial Specialist Job Description

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Our company is growing rapidly and is hiring for a financial specialist. 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 financial specialist

- Responds to in-bound Financial Advisor and Sales Assistant phone calls
- With moderate oversight, may conduct a pre-review of financial plans created by some associates in the department and financial plans created by Financial Advisors and Branch Managers
- May serve as back-up on logging financial plans received
- Office and Offshore team to ensure timely delivery and accuracy of reporting deliverables
- Responsible that the mandated financial statements of the Company are prepared in compliance with SEC and regulations
- Assist in the narrative of the MD&A and responsible for all numbers in the external reports including related supplemental schedules to support the filings
- Responsible for the Earnings Release filings - financial support and related scripts for the CFO and CEO for earnings conference call
- Stock option transactional activity and related stock-based compensation
- Oversee economic development bond accounting
- Review work completed by delegate responsibilities to Financial Specialists

Qualifications for financial specialist

- Proficient in MS Office and HFM
- The candidate should be confident, a self starter, with the ability to operate in

- 5+ years of relevant experience in all aspects of financial planning
- Creation of Ad Hoc reports to assist in decision support
- Bachelor's Degree in Accounting or related business degree, required