

## FINANCIAL ANALYST – CLIENT SUPPORT

**Reports To:** Vice President of Financial Analytics

**Position Description:** Provide technical and analytical support in the management of all clients including large corporate clients with executive benefit plans, bank clients and individual high net worth clients.

### Responsibilities:

- Audit existing client based models to ensure accuracy of the projections and the corresponding results
- Automate client models to enhance department efficiency and eliminate reporting errors
- Review current funding and determine current funding capacity as well as additional funding needs
- Maintain contemporary knowledge of accounting and legal issues and their impact on existing and future business
- Generate illustrations for existing plans and review to determine funding adequacy
- Design insurance, accounting, and benefit illustrations
- Imputed Income calculations
- Prepare/confirm/review any analysis, charts, etc. in enrollment materials and other client deliverables
- Retirement benefit projections
- Provide computer and software support for Executive Benefits Department
- Maintain workflow management report for cases in progress
- Annual Medicare Tax reporting
- Participate as a team member in special projects
- Participate in industry meetings for the purpose of continuing education and/or obtaining industry designations

### Qualifications:

#### EDUCATION AND EXPERIENCE:

- Bachelor's degree in Business Administration, Finance, Accounting, Mathematics, Actuarial Sciences, or related field
- 3-5 years internal audit experience
- Bank audit experience a plus
- Previous Accountant experience a plus

#### SKILLS:

- Excellent interpersonal skills
- Strong Excel skills which includes use of macros, Excel automation (e.g. VLOOKUP), and financial calculations (i.e. NVP, PV, IRR, ROI)
- Strong verbal and written communication skills
- Ability to work autonomously and perform well under pressure
- Strong attention to detail with ability to organize, prioritize, and manage multiple tasks within set deadlines
- Strong financial analysis skills and ability to conceptualize
- Ability to develop advanced working knowledge of life insurance illustration systems
- Ability to master presentation and desktop packages
- Ability to understand complex tax and legal concepts and issues and their impact on sales
- Strong decision-making skills
- Ability to deal with sensitive and confidential data