



Financial Planner and Analyst Reports to: Chief Financial Officer

Summary:

The **Financial Planner and Analyst (FP&A)** is responsible for collecting, analyzing, and providing information that can be used to evaluate economic and business trends using past and present performance as key performance indicators and in forecasting. This role focuses on increasing efficiency and profitability by advising on the financial plan both short- and long-term.

The **FP&A** is also responsible for overseeing staff performance and guiding improvements in the department.

Key Responsibilities:

- Analyze current and past trends in key performance indicators, including all areas of revenue, costs of sales, expenses, and capital expenditures
- Monitor performance indicators, highlighting trends and analyzing causes of unexpected variance
- Oversee and manage the continued development of Budgeting, Financial Forecasting, Operating Plan, and Modeling tools
- Improve performance by evaluating processes to drive efficiencies and understand ROI in programs, pricing, new product rollouts, as well as new projects
- Analyze complex financial information and reports to provide accurate and timely financial recommendations to Management for decision-making purposes
- Recommend financial actions by assessing options to organization goals
- Implement and work with a business intelligence tool and dashboard reports
- Responsible for ad hoc journal entries, reporting, and analysis
- Prepare monthly and quarterly financial reports by collecting, formatting, analyzing, and explaining information
- Build a financial database by identifying sources of information; assembling, verifying, and backing up data
- Present return on investment strategies, identify financial process improvement, implement risk management and tax planning strategies
- Develop financial models and analyses to support strategic initiatives
- Manage the budget manager and other stakeholder relationships
- Prepare Financial Policy and Procedure documentation
- Support Senior Management Team and Department heads with in-depth analysis
- Prepare presentations to Board of Directors and Senior Management Team
- Maintain technical knowledge by attending educational workshops; reviewing publications
- Contribute to team effort by accomplishing related results as needed
- Protect operations by keeping financial information confidential

Qualifications:

- Bachelor's Degree in Accounting or Finance; MBA highly preferred
- 5+ years' experience in the financial industry
- Working knowledge of accounting, recording journal entries, and account reconciliation
- Advanced Microsoft Excel and PowerPoint skills
- Vena experience desirable
- Comprehensive understanding of topics related to financial planning
- Highly organized and possess the highest standards of accuracy and precision
- Exemplary written and verbal communication skills
- Self-motivated and highly driven with an entrepreneurial spirit and results-oriented mindset
- Ability to think creatively
- Strong interpersonal aptitude
- Demonstrated ability to roll up sleeves and work with team members in a hands-on management capacity
- Ability to maintain confidentiality at all times

TO APPLY: Candidates who share our passion for excellence are encouraged to send their resume and a cover letter (including salary requirements) to careers@enrollment.org. Please reference FP&A2021 in the subject line. No phone calls, please.