

Finance Job Function

Financial Analyst V

Grade: 59

Job Code: F0959P

Job Family: Financial Planning and Analysis

Job Family Matrix: [Financial Planning and Analysis \(Finance\) Matrix](#)

Summary

Lead specialized financial analysis for a school/unit to provide advanced solutions in support of financial planning.

Core Duties

- Conduct financial and operational analysis to support planning efforts that span a wide range of initiatives including integrated capital planning process and school/unit based long-range financial planning
- Analyze the consolidated budget, capital plans, multi-year financial plans, etc.; monitor current year budget to actual results. May manage the annual fiscal budget process
- Review the quarterly and year-end financial results, identifying variances from prior year and budget
- Analyze data from various systems to produce regular and ad hoc financial reports
- Communicate results and reports to various University audiences; act as a resource, providing guidance and support
- Provide specialized analytical and quantitative analysis to synthesize findings and provide management with actionable recommendations related to: the preparation of annual budgets, mid-year forecasts, and multi-year financial plans
- Participate in review of operational processes and policies to ensure sound and consistent financial analysis protocol
- Provide staff mentoring and training and development
- Function as subject matter expert and/or project lead
- Ensure financial compliance with University policies and procedures and applicable legal rules and regulations

Basic Qualifications

- Bachelor's degree or equivalent work experience required
- Minimum of 8 years' relevant work experience

Additional Qualifications and Skills

- MBA or Master's degree in relevant field preferred
- Knowledge of Microsoft Office Suite, intermediate Excel skills
- Advanced knowledge of budget management, financial analysis and financial modeling; working knowledge of accounting principles
- Demonstrated experience with financial systems and data query tools

Certificates and Licenses

Physical Requirements

Working Conditions

- Work is performed in an office setting