

FINANCIAL ANALYST

The following class specification is intended to represent only the key areas of responsibilities; specific position assignments will vary depending on the business needs of the department.

DEPARTMENT: Finance

REPORTS TO: Varies

CLASS SUMMARY

Incumbents will perform responsible accounting work for the Tourism Development Authority (TDA) and other financial functions for the County Finance Department, or research and analyze county-wide financial system applications' needs to automate and/or improve existing business practices.

DISTINGUISHING CHARACTERISTICS

The Financial Analyst is a stand-alone classification. It is distinguished from other classifications by its responsibility of performing accounting functions for the TDA or by analyzing the county financial system and automating/improving existing business practices.

TYPICAL CLASS ESSENTIAL DUTIES

- Analyzes financial data and resolves any issues.
- Prepares, analyzes, and reconciles all necessary financial statements and reports.
- Creates, monitors, and resolves special assessments, as assigned by the Financial Director, and resolves issues to include contact with homeowners and payment terms.
- Performs other duties of a similar nature or level.
- Performs work during emergency/disaster situations.

POSITION SPECIFIC DUTIES

Position serving the TDA:

- Monitors the TDA budget and reviews revenues and expenditures to include the processing of purchase orders and payment vouchers.
- Processes and reconciles payroll for TDA employees to include entering payroll information in the general ledger and preparing related payroll and retirement reports.
- Makes presentations to boards in absence of the Financial Director.

Position for the county-wide financial system:

- Researches, analyzes, and documents systems applications' needs and problems to include making recommendations and implementing, modifying, and developing applications and reports to meet end-user needs.
- Manages projects to automate financial processes related to general ledger, accounts payable, accounts receivable, and payroll to include implementing and maintaining the county financial system productivity tools and developing instructions and resources to meet project initiatives and goals.
- Conducts research related to the operations of the financial system and makes appropriate recommendations, which may include cost benefit analyses, for improving the system or operations. Develops special reports using personal computer software and interfacing them with the financial system.
- Develops training material and provides training to staff regarding the use of financial software applications.

KNOWLEDGE AND SKILLS

Knowledge of:

- Accounting and budgeting concepts;
- Applicable federal, state, and local laws, rules, regulations and ordinances;
- Office practices and procedures;
- Basic employee benefit laws and regulations;
- Financial software applications.

FINANCIAL ANALYST

Skill in:

- Research and statistical analysis;
- Using systems databases, reporting tools, and other related software applications;
- Training employees;
- Preparing various reports using SQL, Business Objects, Crystal Reports, or similar software;
- Performing financial analyses;
- Delivering presentations;
- Analyzing and interpreting financial data;
- Communication, interpersonal skills as applied to interaction with coworkers, supervisor, the general public, etc. sufficient to exchange or convey information and to receive work direction.

TRAINING AND EXPERIENCE

Bachelor's Degree in Accounting, Finance, Business Administration, Computer Science, or a closely related field and two years of related accounting or financial systems administration experience; or an equivalent combination of education and experience sufficient to successfully perform the essential duties of the job such as those listed above.

LICENSING/CERTIFICATION

None required.

PHYSICAL REQUIREMENTS/WORKING CONDITIONS

Typically requires walking, fingering, talking, hearing, seeing, and repetitive motions.

Sedentary Work: Exerting up to 10 pounds of force occasionally and/or a negligible amount of force frequently or constantly to lift, carry, push, pull or otherwise move objects, including the human body. Sedentary work involves sitting most of the time. Jobs are sedentary if walking and standing are required only occasionally and all other sedentary criteria are met.

GENERAL INFORMATION

FLSA Status: Exempt

Class Spec Established/Revised: E12/02; R07/07