FP TRANSITIONS®

Title:	Financial Analyst
Classification:	Full-time, exempt
Department:	Financial Analytics

Role Summary: This role is central to our company's mission to help clients identify, build, and realize the value of their businesses. The **Financial Analyst's** primary role is to review data received from clients, integrate that data into FP Transitions' suite of analytical models, perform trend analysis, and prepare valuation reports. The review process begins with analyzing data submitted by the client, identifying possible errors or issues with the data, hosting a data review call with the client, and educating the client about market value drivers. As a contributor to complex, integrated strategic consulting engagements, this person must be able to adapt their approach (both personally and professionally) to the client's strategy and business scenario. The Financial Analyst will use cash flow and valuation models to distribute insights to clients. Analyses and reports completed by the Financial Analyst will be reviewed and approved by a Subject Matter Expert. The Financial Analyst role will also interact with Senior Financial Analysts and other Subject Matter Experts at FP Transitions by preparing new client analyses, benchmarking client data, and reviewing market comparable transactions for a variety of client projects as needed. This analyst must be highly organized, technologically adept, and professional.

FP Transitions Introduction: At FP Transitions, our team is dedicated to helping wealth advisory firms identify, build, and realize value. We are driven by innovation, collaboration, client-centricity, and objectivity. We are entrusted with mission-critical moments and drive life-altering business decisions. Join us in our mission to make a significant impact on the wealth advisory industry

Essential Functions:
Your responsibilities will include, but may not be limited to:
Data Collection

- Serve as the primary contact for clients, providing timely and professional assistance to facilitate the collection of confidential business information. Ensuring the data is handled and entered securely and accurately to produce deliverables.
- Pre-populate models and data repositories, collaborating with other members of the analyst team, for a variety of consulting projects as needed.

Data Analysis & Deliverable Production

- Perform analyses and produce reports using FP Transitions' proprietary suite of financial analysis tools with the guidance of a Senior Analyst or Subject Matter Expert.
- Review client submissions to ensure accuracy with data requests from Project Coordinators/Program Managers.
- Perform trend analysis on client submissions and communicate findings to other members of the analyst team.

Task Management

- Effectively manage your projects, ensuring milestones are met and deliverables are produced with exceptional quality.

Client Communication

- Educate clients on valuation approaches and methodologies, compensation structures, and deal structures.

Database Management

- Maintaining accurate records of client interactions, project status, and relevant data as required by company standards.

Issue Resolution

- Identify and address potential issues or roadblocks that may arise during the client's journey, working proactively to find solutions.

Client Satisfaction

- Continuously monitor and evaluate client satisfaction per leadership guidelines, seeking feedback to enhance our services and achieve client retention goals.

Preferred knowledge, skills, and abilities:

- Organization: Demonstrated ability to manage multiple tasks, prioritize responsibilities, and maintain meticulous attention to detail.
- Communication: Excellent interpersonal and communication skills, both written and verbal, to build strong relationships with clients and internal teams.
- Microsoft Excel: Proficient or greater knowledge of Microsoft Excel and the rest of the Microsoft Office Suite.
- Problem-Solving Abilities: A proactive and solution-oriented mindset, capable of identifying challenges and implementing effective solutions.
- Self-Motivated: Although part of a close-knit team, a desire to work independently and seek solutions instead of relying on direction.

Education and Experience:

- CRM Experience: Familiarity with Salesforce CRM or a similar relational database is preferred.
- Financial Acumen: An understanding of the three major financial statements is required. Understanding of accounting principles is *preferred* but not required.
- 3-5 years of experience in the financial services industry is *preferred* but not required.
- Understanding of business valuation is *preferred* but not required.

Compensation and Benefits:

- $70,000-$90,000 per year DOE.
- Medical, Dental, Vision, Life, Short & Long-term Disability, 401k with 25% employer match.
- Company lunches, snacks, and team building events.
- Company holidays (including employee's birthday) and accrued PTO.

Physical Factors & Working Conditions:

- Full-time exempt; office environment, hybrid remote possible with manager approval; minimal travel required.