FP TRANSITIONS®

Title:	Financial Analyst
Classification:	Full-time exempt; Onsite, Hybrid Available
Department:	Financial Analysis
Reports to:	Director of Valuations

Objective: Seeking a highly organized consultant to collaborate with clients to evaluate the impacts of historical, current, and projected cash flows, demonstrating proficiency in technology and a willingness to contribute to a dynamic and tight-knit team.

FP Transitions Introduction: At FP Transitions, our team helps wealth advisory firms identify, build, and realize value. We value innovation, collaboration, client-centricity, and objectivity. We are entrusted with mission-critical moments and drive life-altering business decisions.

Role Summary: As a Financial Analyst at FP Transitions, you will support the Valuations and Analytics departments with data entry, validation, and analysis. You will demonstrate excellent customer service skills, general business acumen, and an interest in learning about the financial services industry. This is an entry-level position that offers significant career advancement opportunities.

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 collection of confidential business information. Ensuring the data is handled and entered securely and accurately to produce deliverables
- Deliverable Production: Assist the senior analysts and consultants with the production of various deliverables, including complex financial analyses, consulting memorandums, and valuation reports
- Task Management: Effectively manage your projects, ensuring milestones are met, and deliverables are produced with exceptional quality
- 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

Required knowledge, skills, and abilities:

To thrive in this role, the ideal candidate should possess the following qualifications:

- 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 a part of a close-knit team, a desire to work independently.
- CRM Experience: Familiarity with Salesforce CRM and Smartsheet or a similar relational database is preferred
- Experience in the financial services industry is *preferred*, but not required
- Understanding of business valuation is *preferred*, but not required

Compensation and Benefits

- Salary $50K-$65K DOE
- Medical, Vision, Dental, 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's approval; minimal travel required