



MILWAUKEE
JEWISH FEDERATION

JOB DESCRIPTION

FINANCIAL ANALYST (ENTRY LEVEL)

STATEMENT OF PURPOSE:

The primary responsibility of the Financial Analyst is to provide accurate and timely reporting and analysis on all operations of the Milwaukee Jewish Federation and its various programs. Other responsibilities may be assigned as appropriate.

The position is directly responsible to the Accounting Director.
The position is full time, salaried, exempt.

ESSENTIAL FUNCTIONS:

- Monthly Financial Reporting and Analysis
 - Produce financial statements for 22 departments
 - Identify and explain any material variances to budget/forecast
 - Accrue expense as necessary for unpaid balances
 - Prepare draft consolidated financial statement package for review by Chief Financial Officer (CFO)

- Annual Budget Preparation
 - Schedule and lead meetings with each department head
 - Work with department heads to create realistic and appropriate budgets
 - Consolidate department budgets and provide variance explanations for year-over-year changes

- Annual audit
 - Prepare investment and debt footnotes for audited financial statements
 - Obtain audited financial statements for funds held in the Jewish Community Foundation (a program of the Milwaukee Jewish Federation)
 - Send confirmation requests as required by auditors
 - Collect all governance materials requested by auditors

- Other
 - Investigate revenue and expense questions from department heads
 - Attend Finance Committee, Investment Committee, Fiscal Stewards Committee meetings and complete meeting minutes
 - Assist CFO with bond and/or mortgage refinancing
 - Conduct monthly or quarterly financial reviews with each department manager
 - Lead quarterly financial discussion at Federation all-staff meeting
 - Provide monthly reporting for grant-funded projects

This is not necessarily an exhaustive list of all responsibilities, skills, duties, requirements, and efforts associated with the job. While this is intended to be an accurate reflection of the current job, management reserves the right to revise the job or to require that other or different tasks be performed when circumstances change (i.e. changes in personnel, workload, or technological developments).

QUALIFICATIONS:

- Bachelor's degree in finance preferred
- Internship with corporate or non-profit a plus

SKILLS/EXPERIENCE/ABILITIES REQUIRED:

- Strong knowledge of Microsoft® Applications (Excel, Word, etc.)
- Experience with Blackbaud products is a plus
- Strong analytical, verbal and written communication skills
- Ability to prioritize, organize and manage multiple work assignments
- Understanding of accounting principles and GAAP accounting
- Detailed oriented with accuracy and problem solving abilities
- Customer-service focus and commitment to the strategic vision of the Federation

WORK ENVIRONMENT AND PHYSICAL DEMANDS:

The majority of work is done in a general office environment without being exposed to weather conditions. The noise level in the work environment is usually moderate.

The employee is occasionally required to stand and walk; will sit and use hands to finger for computer usage most of the day, may climb stairs although an elevator is available; may stoop, kneel, crouch for filing; must talk on telephone. The employee must rarely lift and/or move up to 25 lbs. Specific vision abilities required by the job include close vision, distance vision, color vision, peripheral vision, depth perception, and the ability to adjust focus especially for computer usage.