

Job Title Financial Data Analyst

Short Description Jax Federal Credit Union is seeking a Financial Data Analyst to be responsible for creating analytical reports that enable managers and other associates in the credit union to make sound decisions. The compilation of reports requires advanced Excel skills, an understanding of SQL, and the ability to learn, create, and use all aspects of budget, financial, and various data models. Must be able to interpret and synthesize large amounts of data and apply current accounting practices.

Full Description Jax Federal Credit Union is seeking a Financial Data Analyst to be responsible for creating analytical reports that enable managers and other associates in the credit union to make sound decisions. The compilation of reports requires advanced Excel skills, an understanding of SQL, and the ability to learn, create, and use all aspects of budget, financial, and various data models. Must be able to interpret and synthesize large amounts of data and apply current accounting practices.

Location: Park Street Building, 562 Park Street, Jacksonville, FL 32204
Status: Exempt

Major Duties and Responsibilities

- Prepare reports to assist managers and associates in making informed decisions.
- Assist the CFO in preparing the budget, including set up of general ledger accounts, setting up the characteristics of financial instruments, creating forecasts, inputting data, and developing reports from the budget model.
- Develop and update Financial Models to assist the accounting team and management in decision making.
- Perform qualitative and quantitative analysis using analytical techniques, tools, models, simulations, etc.
- Analyze processes and workflows to understand input/output to improve and/or automate reports.
- Assure quality, consistent performance and data validation while meeting deadlines and schedules.

Knowledge and Skills

Experience

At least 5 years' experience in Financial Data Analytics required. Advanced Excel skills and familiarity with SQL, SSRS, Power BI and database applications required. Ability to learn and use budget and other financial models and the ability to follow and apply relevant data and instructions. Previous Financial Institution experience preferred, and previous experience working with the Profit Star budget model and nCino Loan Analytics model highly desirable. Must have a working knowledge of accounting principles and be detailed oriented. Strong ability to read and analyze financial reports, perform complex calculations, and effectively research,

analyze, and evaluate information to solve problems and achieve goals.

Education/Certifications/Licenses

Bachelor's degree (B. A.) in Finance, Accounting, or Data Analytics.

Interpersonal Skills

A significant level of trust and diplomacy is required. In-depth dialogues, conversations and explanations with associates and managers and outside vendors of a sensitive and highly confidential nature is a normal part of the day-to-day experience.

Communication can involve educating and/or advising others on matters of significance.

Other Skills

Knowledge of generally accepted accounting principles, basic characteristics of financial assets and liabilities, business analytics and basic statistical analysis. Ability to work standard personal computers (including peripheral equipment), ten-key calculator, and various PC software. Strong organizational, analytical and presentation skills.

ADA Requirements

Physical Requirements

Is able to bend, sit, and stand in order to perform primarily sedentary work with limited physical exertion and occasional lifting of up to 10 lbs. Must be capable of climbing / descending stairs in an emergency situation. Must be able to operate routine office equipment including computer terminals and keyboards, telephones, copiers, facsimiles, and calculators. Must be able to routinely perform work on computer for an average of 6-8 hours per day, when necessary. Must be able to work extended hours or travel off site whenever required or requested by management. Must be capable of regular, reliable and timely attendance.

Working Conditions

Must be able to routinely perform work indoors in climate-controlled private office with minimal noise.

Mental and/or Emotional Requirements

Must be able to perform job functions independently or with limited supervision and work effectively either on own or as part of a team. Must be able to read and carry out various written instructions and follow oral instructions. Must be able to complete basic mathematical calculations, spell accurately, and understand computer basics. Must be able to speak clearly and deliver information in a logical and understandable sequence. Must be capable of dealing calmly and professionally with numerous different personalities from diverse cultures at various levels within and outside of the organization and demonstrate highest levels of customer service and discretion when dealing with the public. Must be able to perform responsibilities with composure under the stress of deadlines / requirements for extreme accuracy and quality and/or fast pace. Must be able to effectively handle multiple, simultaneous, and changing priorities. Must be capable of exercising highest level of discretion on both internal and

external confidential matters..

Acknowledgment

Nothing in the position description restricts management's right to assign or reassign duties and responsibilities to this job at any time.

Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. This Job description is not a contract and should not be constructed as a guarantee of employment for any period of time.

We are an Equal Opportunity Employer and do not discriminate against employees or applicants based on race color, religion, sex/gender, national origin, disability, age, or any other category protected by law.

Education	Bachelor's degree in business, finance, and/or accounting preferred.
Additional Comments	Apply online by visiting: https://www.jaxfcu.org/careers/ .
Credit Union	Jax Federal Credit Union
State	Florida
Contact Name	Aimee Haga
Email	ahaga@jaxfcu.org
Phone	904-475-8023
Fax	904-350-9356
Expiration Date	03/11/2022