**Job title**: Analyst, Financial, Sr  
**Job code**: 11532  
**Grade level**: 95  
**Approval date**: 06-06-2011

### General Workforce Requirements

**General requirements for the Church workforce:**

- Temple worthiness
- Regular attendance and timely arrival at the assigned location

*Note:* The specific statements shown in each section of this Workforce Role Description are not intended to be all-inclusive. They represent typical elements and criteria considered necessary to successfully perform the job.

### Purposes

Briefly describe why this job exists, who the customers are, and what the customers expect.

### Responsibilities

Describe what the major responsibilities of the job are, including accountability, problem solving, relationships, interactions, results, and relevant metrics and measures. List responsibilities in order of importance, and indicate percentage of time spent on each.

1. Coordinate the preparation and analysis of consolidated budgets and financial statements using information from operating statements, account ledgers, work order reports, project tracking systems, etc. Anticipate future needs.
2. Review budget and financial statements. Reconcile and coordinate the reconciliation of appropriation and cash flow budgets to the general ledger. Ensure correct coding to the general ledger. Identify trends and potential areas of concern. Initiate basic adjustments, as needed, and report actions.
4. Perform and coordinate the performance of on-site internal control reviews.
5. Review documents dealing with appropriation or transfer of budgets. Work with departments to resolve differences.
6. Conduct cash control reviews. Includes cost studies and overhead analysis of income sources, cost justifications, and savings analysis for data processing hardware and other equipment.
7. Prepare financial policies and procedures.
8. Administer and control large operational databases.
9. Prepare special studies dealing with financial trends.
10. Design, develop and implement management information systems.
11. May assist with the review and evaluation of personnel performance.

### Qualifications

List the minimum requirements for the position. Identify knowledge and skills required, including formal education, specialized training, and prior experience. Include any degrees, certifications, and licenses that are required.

- Bachelor’s degree in accounting or finance.
- CMA, CPA or MBA preferred.
- Eight to Ten years of relevant experience in accounting, auditing, business management, or equivalent.
- Demonstrate understanding of accounting principles and Church accounting systems.
- Must operate a personal computer and have knowledge of word processing, spreadsheet; in particular, Excel and WordPerfect or Microsoft Word. Must be able to learn new software. This position usually reports to a Finance Manager or Controller.

This is the most senior skill level without direct supervisory responsibility.