



# Financial Analyst

**Department:** Finance  
**Location:** Appleton, WI  
**Reports to:**

**Direct Reports:** None  
**Exemption status:** Exempt

## Purpose

The Analyst is responsible for the day to day forecasting, monthly financial metrics, analytics, reforecasting activities and preparation of the annual budget. These activities are accomplished through the maintenance of financial records, internal controls and adherence to accounting principles/procedures to ensure accurate and timely financial statements and projections. The Analyst will need to manage tight deadlines.

## Responsibilities

### Financial Forecasting and Metrics

- Development and maintenance of daily, weekly and monthly financial metrics
- Compile data and prepare the monthly rolling financial forecast
- Research and analyze financial trends
- Preparation of profitability models

### Financial Analysis and Metrics

- Recommend benchmarks for measuring the financial and operating performance of divisions and departments
- Prepare financial analysis for contract negotiations and product investment decisions
- Develops revenue/expense analysis, projections, reports, and presentations
- Assist in developing reporting tools, metrics, and models to analyze and report the financial performance of the business

### Budget & Variance Analysis

- Annual development of sales forecasts and operating budgets
- Identify and investigate budget to actual variances
- Distribute monthly department actual to budget and collect variance explanations to assist with planning and forecasting
- Assist in preparation of monthly financial statement reports and Board presentation

### Continuous Improvement Projects

- Assist with continuous improvement projects and serve as the department liaison for IT projects
- Support Controller and CFO with data analysis, financial modeling and projects as assigned

### Other Duties

- Commissions report out for Business Development team members
- Other ad hoc requests for financial reporting from department leaders

## Qualifications

### Education/Experience:

- Bachelor degree in Accounting or Finance
- 3-5 years of Accounting or FP&A experience

**Knowledge/Skills/Abilities/Competencies**

- Knowledge of general accounting principles and practices
- Advanced Microsoft Excel skills
- Critical thinking skills to identify alternative solutions and approaches to complex problems
- Ability to listen to and understand ideas presented and contribute to discussions in a collaborative manner
- Demonstrate personal integrity and the ability to act ethically in all situations
- Possess the drive and ambition to exceed expectations

**Success Measurements**

- Ensure the completion of annual revenue forecasts and operating budgets
- Accurate maintenance of rolling forecast
- Ensure data integrity of financial models and metrics

**Working Conditions**

Use of computers and computer systems to process information. 50+ hours per week during month end close, to accomplish special projects and to facilitate business growth.

*Please note this job description is not designed to cover or contain a comprehensive listing of functions or responsibilities that are required of the employee for this job. Functions and responsibilities may change at any time with or without notice.*

**Approved by:**

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**Date Approved:**

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**Date Reviewed:**

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