

This Senior Financial Analyst job description template includes key Senior Financial Analyst duties and responsibilities. You can post this template on job boards to attract prospect applicants.

Job Brief:

We are looking for an experienced Senior Financial Analyst to forecast revenues and expenditures and advise us on future budgeting.

For this role, you should hold a degree in Finance or Accounting (ideally with a CFA certification) followed by relevant work experience. Knowledge of forecasting models and cost accounting processes are key requirements for this position. You will explore investment options and set company-wide financial policies.

Ultimately, you will ensure our financial planning is healthy and profitable and aligns with business objectives.

Responsibilities:

- Developing financial models through benchmarking and process analysis
- Forecasting quarterly and annual profits
- Preparing cost projections
- Develop financial models through benchmarking and process analysis
- Forecast quarterly and annual profits
- Prepare cost projections
- Analyze and report on current financial status
- Conduct thorough research of historical financial data
- Explore investment options and present risk and opportunities

- Coordinate with the [CFO](#) and the executive team on long-term financial planning
- Compare anticipated and actual results and identify areas of improvement
- Participate in budgeting (for departments and projects)
- Review accounting transactions for data accuracy
- Establish financial policies
- Maintain confidentiality of financial information and investment decisions

Requirements:

- Proven work experience as a Senior Financial Analyst, Financial Analyst or similar role
- Hands-on experience with financial and statistical software
- Expertise in MS Excel (creating spreadsheets and using advanced formulas)
- Familiarity with finance databases
- Understanding of Enterprise Resource Planning systems (ERP)
- Up-to-date with accounting laws and regulations
- Excellent analytical skills
- Ability to present financial data using detailed reports and charts
- Demonstrable strategic thinking skills
- Confidentiality in handling sensitive financial information
- BS degree in Finance, Accounting or Economics
- Relevant certification (e.g. CFA/CPA) is a plus