# FINANCE JOB FUNCTION GUIDE

## Financial Analysis Job Family

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| 56E* or 56N | Financial Analyst I or equivalent in finance, business administration or accounting. | Bachelor's degree or equivalent in finance, business administration or accounting. 3+ years of experience. | IMPACT: Some impact on operations, resources, or University’s reputation.  
SCOPE: Serves as a resource for other financial professionals. Provides analysis used by Mgmt. to make decision, which affects the tub/unit. | RECEIVED: Under General Direction: Within this job, the incumbent normally performs regular assignments using own judgment and following department/university policy, while keeping supervisor informed as necessary. Receives general guidance on new projects as to methods, procedures and desired end results. The incumbent has discretion to make decisions within the scope of their responsibilities. Complex assignments are usually reviewed upon completion.  
GIVEN: Individual Contributor: Works independently or as part of a team to achieve results. |

## Typical Duties and Responsibilities
- Responsible and accountable for conducting, complex financial analysis projects.
- Designs, develops, analyzes and produces multiple complex and varied financial reports that require selection, preparation, and interpretation of data using complex data query tools using multiple databases and the creation of financial models.
- Provides complex financial analysis, identifies trends and draws conclusions used to inform management decisions.
- Forecasts, analyzes and prepares complex financial data for programs; provides recommendations on program changes/additions/deletions.
- Provides budget management services and analysis for multiple departments and financial leaders within a tub/unit.
- Responsible for conducting and documenting moderately complex financial analysis projects.
- Designs, develops and produces varied reports from the financial system using multiple data query tools.
- Reviews and produces financial data, and researches discrepancies. Provides data analysis to present for use in planning and decision making.
- Produces reports from the financial system and other reporting tools.
- Creates and maintains detailed financial spreadsheets.
- Prepares and analyzes financial data for the financial statements, endowments and five-year plans.

*Exemption status is determined by FLSA testing

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**NOTE:**

1) Individual positions will typically have most, but not necessarily all of the Duties & Responsibilities listed.
2) Grade Recommendations based on comparative review/analysis of internal positions and external market data.
3) E = exempt, N = non-exempt but outside HUCTW due to job content, grade and/or a Confidential / Supervisory exclusion.