

Senior Financial Analyst

Description

Invoke Tax Partners is looking for exceptional people to join our team! We have an immediate opening for a Senior Financial Analyst, FP&A in our Dallas, TX office. The Senior Financial Analyst works closely with the CFO and other senior managers to increase the Company's efficiency and profitability by assisting with the formulation of both the medium and long-term financial plan.

Responsibilities

- Work closely with the leadership team to formulate the business's medium to long term financial and strategic plan.
- Work with Service Line heads to build their annual budgets and forecasts.
- Produce models to project long term growth and determine the impacting business factors.
- Delivery of competitor analysis, market trends and associated commentary to the Leadership team.
- Analyze financial and operational results to better understand company performance.
- Communicate to senior management the reasons behind the product/department performance and results.
- Provide detailed analysis and commentary on service line and other cost center results.
- Review operations and recommend cost-saving initiatives.
- Prepare business cases to support new investment, strategic, and other business decisions.
- Review existing processes and procedures to develop recommendations for improvement efforts.
- Evaluate previous budgets and expenditures to develop and implement future budgets.
- Communicate results and recommendations to senior management for improvements that will lead to cost reduction, revenue generation, and streamlining operations.
- Provide insights to senior management around financial modeling, forecasts, and profitability.

We are looking for candidates with the following qualities:

- Strong Microsoft Excel skills with experience in various FP&A software programs.
- Detail oriented, strategically minded, and confident.
- Excellent leadership and management skills and be able to build and maintain relationships at all levels.
- Strong presentation skills and impeccable judgement.
- A high level of integrity and excellent problem-solving skills.
- Excellent collaboration skills with the ability to build strong relationships and work effectively in cross-collaborative environment.
- Demonstrated capacity to be highly creative, analytical, and data-driven at the same time.
- Ability to thrive in a fast-paced with a high-degree of accountability and accuracy.
- Ability to manage multiple priorities concurrently and with little oversight.

Hiring organization

Invoke Tax Partners

Employment Type

Full-time

Job Location

Dallas, TX

Date posted

September 25, 2023

- Being proactive to accomplish objectives and achieve goals beyond what is required.

Education

- Bachelor's Degree in Accounting, Finance, or Economics required
- MBA is highly-preferred

Qualifications

- 5-7 years' experience in the financial services industry within the corporate finance/accounting department
- Experience in supporting, executing, and maintaining financial projects and programs
- Experience with reporting/forecasting highly desired