

**FINANCIAL SERVICES ANALYST, SENIOR
CLASSIFICATION DESCRIPTION**

Job Classification Title:	Financial Services Analyst, Senior		
FLSA Status:	Exempt	Pay Grade:	14
EEO-1:	2	EEO-4:	1
<i>This job classification description is intended to be generic in nature and not an exhaustive list of all duties and responsibilities. The specific tasks/duties may vary based on position assignment and as determined by the Town of Queen Creek.</i>			

JOB CLASSIFICATION SUMMARY

Positions assigned to this class are responsible for performing difficult to complex budget, financial and accounting duties.

DISTINGUISHING CHARACTERISTICS

This is a fully qualified and experienced level professional classification in the financial services job family. Incumbents perform the full range of duties that demonstrates knowledge of expected functional requirements or performance specifications within financial services. Work involves the application of sound principles and best practices associated with planning and problem solving. Works independently and performs varied assignments requiring broad knowledge in accounting/finance. Analyzes complex issues and makes recommendations to management.

ESSENTIAL DUTIES

The following are intended to describe core work functions of this classification. While the level and broad nature of essential duties may not change, specific work tasks will vary over time depending on the Town's needs.

- Collects, compiles and reviews applicable financial or budget information for accuracy, completeness and compliance with pre-determined targets, goals and policies, updates organizational charts, goals, and/or performance measures; prepares formal financial or budget documents, revenue and expense projections, and other specialized financial reports and analysis; prepares monthly and annual closing of financials and corresponding budget reports.
- Participates in the planning, implementation and evaluation of the assigned fiscal processes and develops strategies and alternatives that focus on continuous improvement, innovation and change.
- Prepares a variety of financial and/or budget analyses; recommends policy changes or actions based on analyses.
- Develops and updates financial or budget forecasting models; prepares multi-year financial or budget forecasts.
- Designs and conducts training seminars for staff, external attendees (Citizen Leadership, etc.) related to finance, accounting, budgeting, performance measures, and/or capital project management.
- Analyzes and prepares economic impacts of development, annexations and land use proposals; develops financial models used to forecast economic trends.

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- Develops multi-year financing plans for capital improvements and infrastructure projects.
- Analyzes tax, rate and fee structures and recommends changes where appropriate.
- Presents financial analyses to applicable stakeholder groups; presents policy analysis or other financial feasibility studies to senior management.
- Assists internal departments in developing and evaluating performance measures and benchmarks.
- Creates and maintains a variety of financial and/or budget reports.
- Performs related work as assigned.

MINIMUM QUALIFICATIONS (at job entry)

Education and Experience:

Bachelor's Degree from an accredited college or university in Finance, Accounting, Business Administration, or a related field and 4 years of journey-level, related experience; or an equivalent combination of directly related education and experience. Master's degree preferred.

LICENSING/CERTIFICATION REQUIREMENTS

- None

KNOWLEDGE

- Public sector accounting, budgeting, and finance principles and practices;
- Fiscal analysis and research principles and practices;
- Municipal budgeting principles and practices;
- Financial statement preparation methodologies and techniques;
- Customer service principles;
- Municipal accounting procedures, including general ledger, budget, capital assets, and long-term debt;
- Statistical analysis principles and practices;
- Research techniques;
- Forecasting and economic trending methods and techniques;
- Economic impact study principles, practices and techniques;
- Applicable Federal, state and local laws, codes, ordinances, rules and regulations;
- Standard office equipment including the computer and programs relevant to the performance of applicable duties and responsibilities.

SKILLS

- Researching a variety of fiscal and/or budget information;
- Developing financial data into useful reports and presentations;
- Forecasting and recognizing, following and analyzing trends;
- Tabulating, recording, and balancing transactions;
- Preparing financial statements and reports;
- Performing complex accounting calculations;
- Managing projects;

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- Contributing to or leading part of a multi-functional team;
- Working independently;
- Analyzing, synthesizing and drawing conclusions from complex data;
- Using computers and related software applications;
- Arranging information into concise and logical reports;
- Giving presentations;
- Providing customer service;
- Operating standard office equipment;
- Preparing economic trends and forecasts;
- Conducting economic impact studies;
- Interpreting and applying applicable Federal, state and local laws, codes, ordinances, rules and regulations;
- Communication and interpersonal skills as applied to interaction with coworkers, supervisor, the general public, and other interested parties sufficient to exchange or convey information and to receive work direction.

CLASS HISTORY INFORMATION

Created: 2/2022

Amendments:

**FINANCIAL SERVICES ANALYST, SENIOR
PHYSICAL & ENVIRONMENTAL FACTORS**

OVERALL PHYSICAL STRENGTH DEMANDS:

Physical Strength for this classification is indicated below with an "X"	
X	Sedentary: Exerting up to 10 lbs. occasionally or negligible weights frequently; sitting most of the time.
	Light: Exerting up to 20 lbs. occasionally, 10 lbs. frequently, or negligible amounts constantly OR requires walking or standing to a significant degree.
	Medium: Exerting 20-50 lbs. occasionally, 10-25 lbs. frequently, or up to 10 lbs. constantly.
	Heavy: Exerting 50-100 lbs. occasionally, 10-25 lbs. frequently, or up to 10-20 lbs. constantly.
	Very Heavy: Exerting over 100 lbs. occasionally, 50-100 lbs. frequently, or up to 20-50 lbs. constantly.

PHYSICAL DEMANDS:

C Continuously 2/3 or more time	F Frequently 1/3 to 2/3 of time	O Occasionally Up to 1/3 time	R Rarely < 1 hour per week	N Never Never occurs
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Note: This is intended as a description of the way the job is currently performed. It does not address the potential for accommodation.

Physical Demand	Brief Description	C	F	O	R	N
Standing	Communicating with co-workers, observing work site, observing work duties			X		
Sitting	Desk work	X				
Walking	To other departments/offices/office equipment			X		
Lifting	Supplies, files				X	
Carrying	Supplies, files				X	
Pushing/Pulling	File draws, tables and chairs			X		
Reaching	For supplies, for files		X			
Handling	Paperwork		X			
Fine Dexterity	Computer keyboard, telephone pad, calculator, calibrating equipment	X				
Kneeling	Filing in lower drawers, retrieving items from lower shelves/ground				X	
Crouching	Filing in lower drawers, retrieving items from lower shelves/ground				X	
Crawling	Under equipment				X	
Bending	Filing in lower drawers, retrieving items from lower shelves/ground				X	
Twisting	From computer to telephone, getting inside vehicles				X	
Climbing	Stairs, step stool				X	
Balancing	On step stool				X	
Vision	Reading, computer screen, driving	X				
Hearing	Communicating with co-workers and public and on telephone, listening to equipment	X				
Talking	Communicating with co-workers and public and on telephone	X				
Foot Controls	Driving				X	
Other (Specify)						

**FINANCIAL SERVICES ANALYST, SENIOR
PHYSICAL & ENVIRONMENTAL FACTORS**

MACHINES, TOOLS, EQUIPMENT, SOFTWARE AND HARDWARE:

Standard office equipment; vehicle

ENVIRONMENTAL FACTORS:

D Daily	W Several Times Per Week			M Several Times Per Month			S Seasonally	N Never				
	D	W	M	S	N	D		W	M	S	N	
Health & Safety Factors							Health & Safety Factors					
Mechanical Hazards					X		Respiratory Hazards					X
Chemical Hazards					X		Extreme Temperatures					X
Electrical Hazards					X		Noise and Vibration					X
Fire Hazards					X		Wetness/Humidity					X
Explosives					X		Physical Hazards					X
Communicable Diseases				X								
Physical Danger or Abuse					X							
Other (Specify Below)												

PROTECTIVE EQUIPMENT REQUIRED:

None

NON-PHYSICAL DEMANDS:

C Continuously 2/3 or more time	F Frequently 1/3 to 2/3 of time	O Occasionally Up to 1/3 time	R Rarely < 1 hour per week	N Never Never occurs				
				C	F	O	R	N
Description of Non-Physical Demands				C	F	O	R	N
Time Pressure					X			
Emergency Situation								X
Frequent Change of Tasks					X			
Irregular Work Schedule/Overtime					X			
Performing Multiple Tasks Simultaneously					X			
Working Closely with Others as Part of a Team					X			
Tedious or Exacting Work					X			
Noisy/Distracting Environment							X	
Other (Specify Below)								



**FINANCIAL SERVICES ANALYST, SENIOR
PHYSICAL & ENVIRONMENTAL FACTORS**

PRIMARY WORK LOCATION:

X	Office Environment
	Warehouse
	Shop
	Recreation/Neighborhood Center
	Vehicle
	Outdoors
	Combination of Office, Vehicle and Field
	Other (Specify Below)

**FINANCIAL SERVICES ANALYST, SENIOR
ACKNOWLEDGEMENT**SIGNATURE – REVIEW AND COMMENTS:

I have reviewed this description and find it to be an accurate representation of the demands of the classification.

Signature of Employee

Date

Job Title of Supervisor

Signature of Supervisor

Date

Job Title of Department Head

Signature of Department Head

Date

Comments: _____

The above statements are intended to describe the general nature and level of work being performed by individuals assigned to this position. They are not intended to be an exhaustive list of all responsibilities, duties, and skills required. This description is subject to modification as the needs and requirements of the classification change.