



Job Description

Job Title:	Financial Analyst
Department:	Employee Benefits
Reports to:	Team Leader
Status of Position:	Exempt

Essential Duties and Responsibilities:

- Provide financial review for clients with 100+ employees
- Create financial review packages and procedures for all size clients
- Work with and train Account Executive staff in areas of financial analysis, reporting packages and deliverable skill sets.
- Participate and assist Producer in client meetings with financial requirements of clients.
- Special projects as assigned.

Supervisory Responsibilities

None

Educational Requirements

High School College Graduate Other: Missouri Life & Health License

Work Experience

- 2 years of experience in analyzing and managing financial data, preferably within the insurance industry.

Technical Skills

- Proficiency in financial analysis.
 - Familiar with Benefit insurance coverage.
 - Proficiency in Microsoft Word, Excel and Outlook.
 - Proficiency in Adobe Acrobat-or ability to learn this program.
 - Ability to manage client needs and multiple tasks.
 - Attention to accuracy and detail.
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Physical Demands

- May require lifting packages up to 25 pounds.

Travel Required

- **Yes** No

If yes, what percentage of the time? **Up to 25% of time.**

Local travel will be necessary to meet clients, attend network events or community service initiatives as necessary. Occasionally, travel may be nationally.

Additional Requirements

- Excellent interpersonal skills and a pleasant disposition required at all times.
- Ability to work well with others in a fast paced environment.
- Team player.