

# Lawley

INSURANCE | EMPLOYEE BENEFITS

## Senior Financial Analyst

### These are the *fundamental* components of the job:

- Responsible for general ledger accounting functions including daily, weekly, monthly accounting tasks and activities (i.e., intercompany chargebacks, debt compliance).
- Responsible for monthly preparation of Full Time Equivalent (FTE) analysis, payroll worksheet, staff reporting worksheet, intercompany chargeback worksheet and journal entry.
- Works with Manager FP&A to prepare budget as it relates to FTE and payroll; creates and maintains various linked Excel spreadsheets for budgeting process
- Responsible for review and posting of bi-monthly ADP Payroll
- Monitors bank balances and cash management reports to maintain our premium trust requirements, cover our operating cash needs, while maintaining bank compensating balances in order to maximize our yield.
- Support Manager FP&A, Controller and Co-CFO's on third party audits as required, (i.e. 401k pension, workers compensation)
- Support Assistant Controller, Controller, Manager FP&A and Co-CFO's in formulation of internal controls, policies and special projects.
- Creates, organizes and maintains various financial reports in EPIC, Crystal, Qlikview, Excel and Access.

### Other *functions* of the job:

- Collaborates with various departments across the footprint
- Expand and grow in your role when supporting miscellaneous duties as requested

### Skills / traits that we value for this role:

- Bachelor's degree required; Graduate degree and/or CPA preferred
- Minimum of 3-5 years in a similar or related position, some public accounting experience preferred
- Ability to be a senior "go to" person as well as lead others by assigning tasks for project planning and completion
- Strong background in the use of technology: Advanced MS Word, Excel, Access proficiency are a must! Experience with Salesforce, Epic and/or Qlikview preferred
- Ability to work well independently and on a team



*'Lawley provides equal employment opportunities (EEO) to all employees and applicants for employment without regard to age, race, creed, color, religion, sex, sexual orientation, national origin, citizenship, immigration status, gender identity or expression, military status, familial status, marital status, disability or genetics.'*

- Incredible attention to detail and organizational skills
- Ability to learn quickly, expand tasks to create meaning, and develop knowledge through experience
- Positive attitude, even in a fast-paced environment
- A passion to make customers and coworkers feel important and valued
- Dependability and ability to exercise confidentiality

### **A bit about Lawley!**

- We are not a call center environment
- We achieve success by building genuine relationships together, with our teams and clients
- We are a family owned insurance broker (nearly 70 years!)
- We are deeply committed to the communities we serve and love to get involved
- We work hard and play hard!!!

### **Why Lawley?**

- Competitive salary and referral bonuses!
- Expansive Benefits (Medical, Dental, Vision—and SO many more)
- 3 weeks of PTO (prorated based on start date) AND a generous holiday schedule – available 1<sup>st</sup> day!
- Company 401K contribution received starting Day 1 (for participants 21+ years old)
- Educational support, career development, and growth opportunities
- Job Security (we've never had a lay-off, even during the pandemic)
- Flexibility, including hybrid schedules! Business hours 8am-4:30pm
- Comfortable, family-oriented culture, with an emphasis on work life balance
- Unlimited Volunteer Time Off opportunities (so you can assist in serving our communities)
- Fulfilling opportunities that align with your career path and our business needs

The compensation range for this position takes many factors into consideration including but not limited to: years of experience/training, skill set, and licenses/designations. It is not typical for an individual to be hired near the top of the range for a position as circumstances and location can vary in every hiring situation. A reasonable estimate of the current range is \$71,706.08 to \$119,510.13.

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