

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, producer benefits, account reconciliations).
- 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 ADP Payroll
- Maintains monthly, quarterly and yearly audit procedures on commissions using Qlikview queries to ensure accurate commission payment to partners and producers; updates transactions as necessary.
- Analyzes, designs, implements logical data models within Qlikview that tie back to financial information (i.e., production).
- Support Manager FP&A, Controller and Co-CFO's on third party audits as required, (i.e. year end audit, 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



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- Ability to work well independently and on a team
- 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 1st 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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