

Financial Planning and Analysis

Ancora is seeking a financial professional to support the accounting team. The incumbent will play a pivotal role in guiding strategic financial decisions and providing analytical support to optimize the financial performance. This position requires a deep understanding of financial analysis, budgeting, forecasting and data analytics.

Location

This position is located at Ancora's Cleveland (Mayfield Heights), Ohio office with some hybrid flexibility.

Duties & Responsibilities

Financial Analysis

- › Conduct in-depth analysis of financial data including revenue, expenses and profitability, utilizing analytical abilities to identify trends, opportunities and areas for improvement.
- › Develop and maintain sophisticated financial models integrating data from multiple sources to forecast revenues, assess risks and support strategic initiatives.

Budgeting and Forecasting

- › Collaborate with senior management to develop annual budgets and long-term financial plans aligned with business objectives, leveraging data analytics insights to enhance forecasting accuracy.
- › Utilize data to monitor financial performance against budgets and forecasts, identifying variances and implementing corrective actions when necessary.
- › Provide regular updates and forecasts to management, highlighting key drivers and potential impacts on financial performance.

Strategic Planning

- › Support strategic decision-making processes by providing financial insights and analysis on potential initiatives, acquisitions and growth opportunities.
- › Evaluate the financial implications of services or market expansions to assess opportunities and drive strategic planning efforts.
- › Assist in developing business cases and financial models integrating analytical insights to support investment proposals and strategic projects.

Reporting and Communication

- › Prepare and present financial reports, analyses and insights to senior management to highlight key performance metrics, trends and actionable recommendations.
- › Collaborate with cross-functional teams, including accounting, sales and operations, to gather data and insights for reporting and analysis, leveraging data analytics techniques to drive data-driven decision-making.
- › Ensure accuracy and integrity of financial data and reports to adhere to regulatory requirements and internal policies.

Continuous Improvement

- › Identify opportunities to streamline processes, improve efficiency and enhance the quality of financial analysis and reporting, leveraging analytical insights to drive continuous improvement initiatives.
- › Stay informed about industry trends, regulatory changes and best practices in financial planning and analysis.

Qualifications

- › Bachelor's degree in Finance, Accounting, Economics, or related field
- › MBA or CFA designation preferred
- › 12+ years of experience in financial planning and analysis, preferably in the wealth management industry
- › Advanced proficiency PC skills, including Microsoft Word, Excel, PowerPoint and Power BI
- › Strong analytical skills with proficiency in financial modeling, forecasting and variance analysis, utilizing data analytics tools
- › Excellent communication and presentation skills, with the ability to distill complex financial concepts into clear and actionable insights
- › Demonstrated ability to work independently, prioritize tasks and meet deadlines in a fast-paced environment
- › Attention to detail and a commitment to maintaining data accuracy and integrity
- › Knowledge of regulatory requirements and compliance standards in wealth management
- › Strong work ethic
- › Ability to follow organizational policies and procedures
- › Professional appearance and demeanor

Benefits

Ancora offers a competitive salary and excellent benefit package with a culture of teamwork and recognition.

About Ancora

Ancora is client-focused and growth-oriented investment and financial advisory firm based in Cleveland, Ohio. The Firm is recognized for providing investment advisory, money management, insurance and retirement plan advisory services to individuals and institutions. Ancora promotes a friendly, family-oriented work environment and encourages our employees to strive for personal and professional growth with the highest level of integrity.

Ancora is an Equal Opportunity Employer

All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, national origin, protected veteran status, disability, or any other basis protected by applicable law.

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