

Director of Financial Analysis - St Pete

This position is responsible for the continued advancement of CU Engage's financial analysis and modeling practice. Areas of concentration include: Credit/Debit/ATM Processing, Visa/MasterCard Brand, PIN/EFT Network, Online Banking, Bill Pay, Mobile Banking, as well as a growing menu of related services. This position reports to the Managing Partner of CU Engage.

Internal:

- Maintenance and advancement of a CU Engage LOB pricing matrices
- Support of CU Engage internal modeling including:
 - RFP Pricing comparisons/revisions
 - Client-facing summary documentation
 - Overall pricing related components for:
 - Credit and Debit
 - Network
 - Brand
 - Online products
 - Loyalty
 - Other future products to be determined
 - Document consistent pricing procedures
 - Educate and train new hires on pricing components
 - Develop and manage junior level pricing positions to grow with the company
 - Support Project Management group
 - Manage projects as needed
 - Support Business Development needs
 - Credit Union visits as needed

Other:

- Subject Matter Expert on financial related industry topics in the Credit Union payment space
- Develop and deliver content for thought leadership efforts
- Training new hires on industry related topics
- Maintain relevant industry relationships
- Ability to travel

Experience:

- 5 or more years' experience in the banking and/or payments industry, with preference given to credit/debit card processing, electronic banking, bill pay and/or mobile banking.
- Leadership experience
- Financial modeling and analysis experience
- PowerBI experience
- Advanced Excel and other financial software experience



- Knowledge of Credit, Debit, Online Banking invoice/pricing
- Credit Union or Banking experience preferred
- Confident and compelling presentation skills, with proven ability to presenting to senior leadership.
- Working knowledge and experience in MS Word and PowerPoint.

Skills/Competencies

- Analytical - Synthesizes complex or diverse information. Collects and researches data. Uses intuition and experience to complement data. Designs work flows and procedures.
- Problem Solving - Identifies and resolves problems in a timely manner. Gathers and analyzes information skillfully. Develops alternative solutions. Works well in group problem solving situations. Uses reason even when dealing with emotional topics.
- Collaboration - Effectively builds and maintains partnerships with clients, prospects and people at all levels across the company. Contributes to team and company success. Maintains flexibility and reacts to change appropriately. Communicates and shares information with candor that builds trust and enhances relationships.
- Communication - Creates and sustains ongoing forums that encourage two-way communication opportunities. Demonstrates and promotes positive prospect, client, and work relationships. Proactively addresses and manages conflict and disputes. Works to achieve constructive resolution.
- Planning/Organizing - Prioritizes and plans work activities. Uses time efficiently. Plans for additional resources. Sets goals and objectives. Organizes or schedules other people and their tasks. Develops realistic action plans.
- Quality - Demonstrates accuracy and thoroughness. Looks for ways to improve and promote quality. Applies feedback to improve performance. Monitors own work to ensure quality.
- Technical Skills - Assesses own strengths and weaknesses. Pursues training and development opportunities. Strives to continuously build knowledge and skills. Shares expertise with others.
- Professionalism – Approaches others in a tactful manner. Reacts well under pressure. Treats others with respect and consideration regardless of their status or position. Accepts responsibility for own actions. Follows through on commitments.
- Adaptability – Adapts to changes in the work environments. Manages competing demands. Changes approach or method to the best fit the situation. Able to deal with frequent changes, delays, or unexpected events.
- Negotiation – Ability to broker the negotiation of complex deals to a successful resolution.
- Time Management - Ability to multi-task and prioritize conflicting tasks and requests.
- Presentation - Confident and compelling presentation skills, with proven ability presenting to senior leadership.
- Negotiation – Ability to broker the negotiation of complex deals to a successful resolution.

Education/Training:

- Bachelor's Degree in business or finance/accounting

Job Type: Full-time