

CLIENT OVERVIEW

The mission of this financial organization is to partner with member shareholders in the region to provide competitively priced funding, a reasonable return on investment, and support for community investment activities to promote home ownership.

POSTION SUMMARY

The Senior Analyst will assist the Strategy and Solutions team in the Sales, Strategy, & Solutions Group. Activities include analyzing and interpreting mortgage market and financial market data, modeling and analyzing balance sheets of financial institutions, including banks, credit unions and insurance companies, and developing asset-liability product solutions and ideas primarily in the investments and loan funding space. The Senior Analyst will assist in internal strategic planning analysis, forecasting, and balance sheet modeling. This role will work closely with other members of the Sales, Strategy and Solutions, Balance Sheet Management, and the Mortgage Trading desk to assist in the creation of strategies for clients.

ESSENTIAL DUTIES

- Research banking, credit union, and insurance company data from sources such as the Federal Reserve, FDIC, OCC, NCUA, NAIC, SEC reports, and SNL to produce timely reports for the awareness and education of Sales and Solutions staff as well as for member use
- Work with large internal datasets using Tableau and/or SQL to quickly gather member product use and product pricing trends and tools
- Build reporting tools to organize data into valuable information for the use of Sales and Solutions teams
- Assist in developing models, analytics, whitepapers, and tools to assist sales directors in sustaining and growing member usage across products lines (Advances, Mortgage Partnership Finance, Letters of Credit, and Community Advances)
- Work with Solutions Team to analyze member business problems and identify opportunities to offer solutions
- Study financial institution (bank, credit union, and insurance company) business models and identify future/emerging trends
- Maintain and expand industry and product knowledge to be relevant and beneficial to members needs
- Perform analyses of secondary mortgage market pricing and trends

- Participate in bank strategic planning processes, including product forecasting, balance sheet modeling, and process improvement/cost-benefit analysis
- Create and give presentations and analysis with creative visual elements and content for strategic planning, hosted conferences, executive team, and board of directors
- Complete other Sales, Strategy & Solutions projects, as assigned

REQUIREMENTS

- 3-5 years of experience in a financial institution involving one or more of the following: market analysis, balance sheet modeling, mortgage/investment research, statistical modeling, financial engineering, computer programming, and/or risk modeling.
 - 3-5 years' experience can be substituted with relevant education
- MS Office (MS PowerPoint, Excel, Word) required; VBA, Python, JavaScript, Microsoft.Net, C-Sharp and HTML experience a plus.
- Database experience/mapping and software such as MS Access, Tableau, SQL required
- Bachelor's degree in Finance, Accounting, Mathematics, Economics, or related field. CFA and/or Master's degree preferred.
 - Knowledge of financial engineering, risk modeling and computer programming a plus.

SKILLS

- Excellent communication (verbal, written, and listening) skills
- Strong quantitative, analytical and computer programming skills
- Ability to create and manipulate large spreadsheets and data
- Ability to break down ideas/issues leading to solutions
- Ability to conduct research to uncover answers and provide solutions
- Organized and highly detail-oriented
- Self-directed, yet strong orientation to be successful in groups