SENIOR FINANCIAL ANALYST

Mezrah Consulting specializes in the development of corporate non-qualified executive benefits plans for large private and public companies, banks and insurance entities.

The Senior Financial Analyst will be an integral member of the case design team, supporting or developing the initial design and evaluation of non-qualified executive benefit plans, corporate owned life insurance (COLI) and bank owned life insurance (BOLI), and related investment portfolios. They will also analyze various benefit and portfolio strategies and the corresponding impact on corporate client financial statements. The position will report to the Director of Financial Analytics and engage the most senior members of company management, as well as participate in conference-based or in-person meetings with executives from client companies.

Responsibilities (will vary based on experience)

- Perform due diligence on carrier and product selection.
- Maintain contemporary knowledge of accounting and legal issues and their impact on existing and future business.
- Generate illustrations for proposed plan, including mortality-adjusted studies.
- Illustrate and analyze alternative funding methods to support plan's objective.
- Generate illustrations for existing plans and review to determine funding adequacy.
- Sensitivity analysis on varying plans and their impact on client statement of profit and loss (P&L) and balance sheet.
- Develop Excel illustrations (tables and charts) and assist with presentations for proposed plans.
- Maintain and update library for product designs and sample presentations.
- Maintain industry files and carrier materials.
- Maintain workflow management report for cases in progress.
- Coordinate with other teams on the proposed plan of insurance, purpose and ongoing administration.
- Participate as a team member in special projects.
- Continuing education and/or training to increase industry knowledge or obtain additional professional designations.

Qualifications

Education and Experience

- Bachelor's degree in Business Administration, Accounting, Finance, Mathematics, Actuarial Sciences, or related field
- 3+ years of modeling experience, specifically time value of variable cash flow; working knowledge of DTA/DTL a plus.
- CFA Level I or II candidate preferred
- Insurance industry experience a plus, with preference to candidates with working knowledge of COLI/BOLI structures and IDFs or mutual funds
- Working knowledge of Capital IQ and/or Morningstar a plus

Skills

- Proficiency in Excel which includes the use of macros, Excel automation (e.g. X-LOOKUP, V-LOOKUP, Ranges) and financial functions (i.e. NVP, FV, PV, IRR, ROI, etc.). Candidate will be tested on

- Strong verbal and written communication skills
- Able to work autonomously and perform well under pressure
- High attention to detail with ability to organize, prioritize, and manage multiple tasks within set deadlines
- Confident in their ability to master presentation and desktop packages
- Strong decision-making skills and excellent interpersonal skills
- Ability to deal with sensitive and confidential data
- Ability to work in a fast-paced and demanding work environment

Mezrah Consulting Culture

- **Fun:** At the core of everything we do
- **Honesty:** Open and honest communication is paramount and valued
- **Integrity:** We stand behind our commitments to our employees and clients alike
- **Innovation:** We embrace change and are always thinking with a vision toward the future, creating new strategies and simplifying complex ideas
- **Focus:** Growing business by growing our people