

Financial analyst job description

Updated October 17, 2026. Written and reviewed by the HRTally Research Team. Replace everything in [brackets].

Details

- Department: [Department]
- Reports to: [Manager title]
- Location: [City, State, or remote]
- Employment type: [Full-time, part-time, or seasonal]
- FLSA status: Exempt
- Pay range: [\$X to \$Y per year]

About [Company]

[Two or three sentences about what your company does, who it serves, and why people like working here.]

Job summary

We're looking for a financial analyst to build forecasts, analyze performance, and give our leaders clear insight into what's driving the numbers.

What you'll do

- Build and maintain budget, forecast, and long-range planning models.
- Analyze monthly results against plan and explain key variances.
- Prepare management reports and leadership presentations.
- Model business cases for new investments, pricing, and hiring.
- Partner with department leaders on headcount and spending plans.
- Track key performance indicators and build dashboards.
- Support the annual planning process.
- Improve financial data, tools, and reporting processes.

What you'll need

- Bachelor's degree in finance, accounting, economics, or a related field.
- [Two] or more years of financial analysis experience.
- Advanced Excel and financial modeling skills.
- Clear communication with non-finance leaders.

Nice to have

- MBA or CFA progress.
- Experience with [planning or BI tools].
- Experience in [industry].

Skills

Financial modeling, Forecasting, Data analysis, Business partnering, Presentation, Excel.

Physical demands and work environment

Office, hybrid, or remote setting.

Pay and benefits

[\$X to \$Y per year], based on experience and location. [List benefits, such as health insurance, retirement plan match, paid time off, and training.]

Equal opportunity

[Company] is an equal opportunity employer. We consider all qualified applicants without regard to race, color, religion, sex, sexual orientation, gender identity, national origin, age, disability, genetic information, veteran status, or any other status protected by law. If you need a reasonable accommodation to apply or interview, contact [name] at [email or phone].

Hiring notes for HR and the hiring manager

Pay data

- Median hourly wage: \$49.40 (BLS OEWS, May 2025, SOC 13-2051, Financial and investment analysts).
- Median annual equivalent: \$102,750 (hourly median x 2,080 hours).
- Mean annual wage: \$116,800.
- Check state and metro data at bls.gov/oes before setting your range, and include the range in postings where the law requires it.

Exempt status and legal notes

FLSA status: Usually exempt. Duties and pay decide overtime eligibility, not the job title.

Financial analysts are usually exempt under the administrative exemption when they analyze data and make recommendations that affect business operations, and they're paid on a salary basis above the threshold. The DOL has noted that employees who mainly sell financial products don't qualify on that basis. Analysts who handle investments for clients may also need FINRA registration.

How to customize it

- Name the leaders the analyst will partner with.
- Describe the models and reports they'll own.
- Say what tools you use for planning and reporting.
- Describe the planning calendar.

Interview questions

1. Walk me through a model you built and how leaders used it.
2. Revenue came in 8 percent under forecast. Where do you start?
3. How do you present bad news to a department head?
4. How would you model the cost of adding 10 people to a team?

Before you post

- Separate required from preferred. Required means you won't hire without it. Everything else is preferred. Long required lists screen out qualified people.
- Describe physical demands and environment. Lifting, standing, shifts, travel, noise, temperature. This sets honest expectations and supports an ADA essential functions record.
- State the pay range. Required in a growing list of states and cities, and expected by candidates everywhere else.

- Say exempt or nonexempt. Decide based on duties and salary before you post, and keep the classification consistent with how you pay.
- Name required licenses and checks. Licenses, certifications, background checks, drug tests, and driving record reviews, with the timing of each.
- Add the accommodation and EEO statement. Tell candidates how to request a reasonable accommodation, and include your equal opportunity statement.

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