

## **Financial Planning Analyst – Job Posting**

Collectivfide is growing, so we're looking for someone to add to our family! We are looking for a driven Financial Planning Analyst with a forward-thinking mindset that's going to help propel us to the next level. This role is ideal for someone who has focused their career on financial modeling/projections, forecasting, & budgeting and continues to seek opportunities for improvement.

Reporting to the Assistant Controller, this role will provide key insights for business planning, decision making, forecasting and improvement across Collectivfide and its brokerages. This role will be hybrid, primarily remote but will require in-office attendance for collaboration days, team meetings, etc.

### **What Will You Spend Your Time Doing?**

- Develop & improve existing financial models related to strategy, projections, and budgeting for Collectivfide and its broker partners.
- Collect, analyze and present data to key stakeholders and senior leadership to assist with strategic decision-making.
- Integrate key financial and operational interactions into financial models for analysis and forecasting
- Deliver accurate and effective reporting of financial metrics and KPIs to Senior Leadership to assist with strategic decision-making and continuous improvement of the business.
- Benchmarking and budgeting for our broker partners.
- Utilize Excel formulas and other means to develop tools that will aide in automation leading to synergies and efficiency across the organization.
- Provide support to the Finance team with financial analysis, including scenario and ad hoc analysis used to inform decision making or present information to management & the Board.
- Assisting with M&A and other job duties as required.

### **Qualifications:**

- Minimum 3 years' experience in a financial planning or forecasting role.
- Strong aptitude for financial modeling and manipulation of large quantities of data.
- Solid MS Office experience (e.g. PowerPoint, Word, Excel).
- Must have advanced Microsoft Excel Skills with a proven track record of creating/automating templates and reports.
- Exceptional analytical skills to identify trends and variances.
- Adaptable, flexible, brings a can-do attitude to everything they do.

### **So, What Will It Be Like to Work Here?**

Here's what our employees had to say in our most recent employee engagement survey.

*"I'm proud to tell my friends about what it's like to work here."*

*"Maintaining a positive culture is a top priority, it's one of the things that makes Collectivfide a great place to work."*

*"I love working at Collectivfide because going to work and knowing that the work I am going to be doing is meaningful, appreciated, and contributes to the success of the company."*

Please submit your resume in confidence to [jobs@collectivfide.com](mailto:jobs@collectivfide.com)

Collectivfide is committed to providing accommodations and to achieving a barrier-free workplace for individuals with disabilities. Should you require an accommodation to participate in our recruitment process, we will support you by considering your individual accessibility needs.

### **About Us**

Formed in 2019, Collectivfide Insurance Group Inc. is committed to protecting the independent broker distribution channel. By working alongside our partners, we support brokerages with all facets of their operations in order to help them focus on what matters most, serving and building relationships with members of the communities they serve. We are driven by a purpose that is bigger than just profit. By giving back, we are helping our communities thrive, providing us with a sense of ownership, pride, and meaningful contribution.