

## **Financial Analyst – Executive Benefits /COLI / BOLI**

### **Description:**

Provide marketing support, including financial analysis and technical solutions, in the initial design and re-evaluation of **non-qualified executive benefit plans** for a national financial consulting firm. Complete life insurance illustrations, perform due diligence, analyze strengths & weaknesses of the plan design to provide the rationale for the final design and marketing proposal.

Ability to create, build and enhance spreadsheet models to accommodate specific concepts and markets is critical. Strong Excel modeling skills which includes the use of macros, Excel automation (e.g. @VLOOKUP) and use of Visual Basic programming is paramount for success.

Ideal candidates will thrive in a fast paced entrepreneurial environment. Strong organizational skills will provide the platform for managing multiple tasks, prioritizing work and meeting multiple client deadlines. They will be resourceful in acquiring both information and the knowledge required to be successful.

### **Requirements:**

- COLI/BOLI experience is a must
- Comprehensive understanding of executive benefit plans (e.g. deferred compensation, SERP's, split dollar, etc.)
- A Bachelor's degree in Finance, Mathematics, Accounting or Actuarial Science.
- Strong financial & analytical skills
- PowerPoint Expertise (graphics, linking from Excel, etc)
- Exceptional Excel skills including creating spreadsheet models for financial calculations (NPV, PV, IRR, ROI)
- Strong attention to detail
- Effective verbal and written communication skills
- Ability to organize, prioritize and manage multiple tasks
- High work standards

### **Preferred:**

Master's degree in Finance, Mathematics, Accounting or Actuarial Science