Financial Associate I (0193)

**Basic Purpose/Job Function:** Providing management, administration and/or analysis and evaluation of financial activities within a college or complex university department.

**Examples of Titles Replaced:** Financial Analyst; Budget Analyst; Financial Administrator; Coordinator, Account Services; Coordinator, Financial Services; Assistant Manager, Accounting Operations I

**Typical Functions May Include:**

1. Collecting and analyzing data and preparing financial reports
2. Monitoring financial and budgetary systems for the department/college to insure proper allocation of expenditures and compliance with applicable regulations
3. Balancing all accounts and preparing monthly financial statements
4. Generating reliable cost information to be used in preparation of new or modified budget proposals
5. Assisting in the preparation and administration of the annual budget and preparing follow-up reports as requested throughout the year
6. Developing, recommending and administering management information systems for the college/department including financial records, personnel records, student enrollment statistics, physical facilities and equipment
7. Coordinating with University administration offices regarding financial practices within the college/department
8. Advising on matters concerning administrative practices, policies and procedures in regard to accounts, budgets and/or forecasts for the department and the university
9. Assisting in developing and modifying accounting systems necessary to ensure sound practices are followed for disbursement of university funds
10. Performing other related duties as assigned

**Risk Management:** Uses established safety practices to protect the health and safety of personnel and property.

**Supervision of Others:** May serve as lead for others doing similar or lesser financial duties or supervise a small staff. Provides administrative supervision for persons maintaining financial and other management information records.
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**Supervision Received:** Receives general supervision from designated supervisor.

**Minimum Qualifications:**

**Education:** Bachelor’s Degree  
**Type:** Accounting, Business Administration or related field

- **Experience:** 0 - 24 months  
**Type:** Financial, budgeting or accounting

- **Skills:** Effective oral and written communication, familiarity with computers, knowledge of computer software, ability to work independently and good organizational skills

- **Special Requirements:** Frequent exposure to pressure caused by deadlines and busy periods; may be required to travel; requires contact with other departments and university officials; background check required as a condition of employment

- **Licenses:** Determined by the nature of the position and/or department

- **Certifications:** Determined by the nature of the position and/or department

Minimum requirements may be met by an equivalent combination of education and experience, unless otherwise designated in writing by the department.

Departments are responsible for site-specific job descriptions.