

Senior Business Analyst (Financial Services)

Job Description

The Senior Business Analyst provides strategic business analysis services to our financial services partners. In this role, you will collaborate closely with business units to gain an in-depth understanding of their business strategies, processes, services, roadmaps, and the overall context in which they operate. Your primary focus will be on understanding and documenting the capabilities needed to address business challenges.

Responsibilities:

1. Business Analysis:

- Work closely with business units to understand their operational, financial, and technological needs.
- Review assigned business processes from end-to-end, identifying operational risks and opportunities for improvement.
- Collaborate with stakeholders to define requirements and translate them into actionable solutions.

2. Portfolio Accounting and Performance Measurement:

- Leverage your experience with various portfolio accounting software and performance measurement tools.
- Analyze investment portfolios, track performance metrics, and provide insights to optimize investment strategies.
- Ensure accurate and timely reporting for clients, including RIAs, Institutional Banks, Wealth Managers, and hedge funds.

3. Project Management:

- Lead or participate in projects related to operational business functions.
- Manage project scope, schedules, and milestones.
- Collaborate with cross-functional teams to drive successful project outcomes.

4. Data Analysis and Process Improvement:

- Apply your expertise in information systems to analyze complex data.
- Identify process design changes, focusing on quality improvement and data management.
- Integrate new systems and processes with existing ones.

5. Relationship Management:

- Manage customer relationships by developing effective communication processes.
- Stay current with customer needs and strategies.
- Facilitate project meetings and presentations for diverse audiences, including senior management and technical staff.

6. Leadership and Collaboration:

- Provide leadership to team members and peers.
- Articulate ideas and viewpoints to senior management.
- Drive issue resolution and hold yourself and the team accountable for results.

Qualifications:

- Bachelor's degree in finance, business, or related field preferred
- Minimum of 5 years of experience as a Business Analyst or related field, preferably in financial services
- Proficiency in portfolio accounting software and performance measurement tools.
- Strong analytical skills and attention to detail.
- Excellent communication and collaboration abilities.

If you are a proactive problem solver with a passion for optimizing financial processes, we encourage you to apply for this exciting opportunity!