



# FIRST MIDWEST GROUP

## JOB DESCRIPTION

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**JOB TITLE:** Financial Associate

**FLSA STATUS:** Exempt

**DEPARTMENT:** Operations

**DATE:** April 12, 2019

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### **POSITION SUMMARY:**

Our Financial Associate will support the organization by having exposure to all aspects of the deal process from initiation and due-diligence through deal structuring and post-investment portfolio management. This role is a balance between financial analysis, business strategy, and execution.

### **SUPERVISION:**

Reports to and works under the general direction of our Director of Outside Development.

### **ESSENTIAL FUNCTIONS:**

*The essential functions or duties listed below are intended only as an illustration of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if work is similar, related, or a logical assignment to the position.*

- Provide overview, analysis and financial evaluation of new investment opportunities to the Executive Committee,
- Assist with the preparation and presentation of investment recommendations to the Executive Committee,
- Identifies new investment, merger, or acquisition opportunities for the company,
- Complete extensive financial modeling on prospective investments, and interprets financial data in order to assist in corporate financial decisions,
- Participate in negotiations on behalf of company for new investments that impact project return,
- Maintain internal database of potential investments,
- Develop and help implement strategies to increase revenue, improve operations, strengthen financial controls, and increase value,

## Education and Minimum Qualifications

- Bachelor's Degree is required,
- MBA, preferred
- Leadership experience in a strategic role,
- Extensive financial modeling experience,
- Proficient with MS Office applications (Excel, Word, Outlook, and Power Point),
- Organized with the ability to manage competing priorities,
- Strong analytical, interpersonal and communications skills,
- Private equity, investment banking or consulting, preferred,
- High degree of integrity; strong moral character

### **DISCLAIMER:**

*The above statements are intended to describe the general nature and level of work being performed by people assigned this job. They are not intended to be an exhaustive list of all responsibilities, duties and skills required of personnel so classified. The omission of specific statements of duties does not exclude them from the position if the work is similar, related or a logical assignment to the position.*

*The job description does not constitute an employment agreement between the employer and employee and is subject to change by the employer as the needs of the employer and requirements of the job change.*

*First Midwest Group is an Equal Employment Opportunity Employer. In compliance with the Americans with Disabilities Act, First Midwest Group will provide reasonable accommodations to qualified individuals with disabilities and encourages both prospective and current employees to discuss potential accommodations with the employer.*

### **REVIEW / APPROVALS:**

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Employee

\_\_\_\_\_  
Date

\_\_\_\_\_  
Supervisor

\_\_\_\_\_  
Date

\_\_\_\_\_  
Human Resources

\_\_\_\_\_  
Date