

# Financial Consultant Job Description



## FINANCIAL CONSULTANT RESPONSIBILITIES INCLUDE:

- Assessing company's financial status
- Analyzing investment plans
- Sourcing and evaluating capital expansion options, including loans and funding

## JOB BRIEF

We are looking for a Financial Consultant to provide guidance on investment decisions, cash management and day-to-day company expenses.

Financial Consultant responsibilities include forecasting costs and revenues, conducting risk analyses for financial plans and evaluating capital expansion options (e.g. funding or loans.) To be successful in this role, you should have a Finance or Accounting degree and relevant work experience as a Financial Adviser to large clients.

Ultimately, you will help us maintain our company's financial health.

## RESPONSIBILITIES

- Assess company's financial status
- Analyze investment plans
- Source and evaluate capital expansion options, including loans and funding
- Advise on selling and buying stocks and bonds
- Forecast revenues and costs and report any discrepancies
- Analyze market trends and identify risks and opportunities
- Manage current and future tax payments
- Monitor financial procedures and ensure compliance with the law
- Provide solutions and set goals to increase profitability
- Review day-to-day transactions to identify areas of improvement

## REQUIREMENTS

- Proven work experience as a Financial Consultant, Financial Adviser or similar role
- Hands-on experience with accounting software and statistical packages
- Good knowledge of fiscal policies
- Excellent analytical skills, along with the ability to create detailed reports and spreadsheets
- Attention to detail
- Confidentiality
- BS degree in Finance, Accounting, Economics or related field
- Additional certification (e.g. CFP or CFA) is a plus

**SOURCE:** <https://resources.workable.com/financial-consultant-job-description>