



Job Description – Senior Financial Analyst

Exempt or Non-Exempt:	Exempt
Full-time or Part-time:	Full-time
Regular or Temporary:	Regular
Bargaining or non-bargaining:	Non-Bargaining
Department:	Finance
Reports To:	VP of Finance and Accounting
Minimum Days Required in the Office per Week. This minimum is subject to change per department needs and at the direction of the supervisor. The requirement is expected to be higher for new employees during their first 6 months of training.	3

About the Role

The Senior Financial Analyst works closely with the Vice President of Finance & Accounting on short- and long-term financial planning and analysis. This role collaboratively supports proactive, data-informed performance evaluation and decision-making across Aloha United Way through budgeting, forecasting, variance analysis, and financial reporting.

The ideal candidate is an experienced finance professional who can interpret financial results, explain key drivers to non-finance audiences, and connect budget and forecast activity to operational realities. Success in this role requires sound financial judgment, strong reporting and analytical skills, and the ability to support thoughtful planning and effective stewardship of Aloha United Way's resources.

Essential Duties and Responsibilities

- Support annual budget development by analyzing prior year performance, current year trends, and budget vs. actual results to prepare insights, assumptions, and department-level considerations for Finance leadership and department leaders.
- Prepare budget working files, consolidated schedules, and related materials for annual and ad hoc budget processes.
- Prepare budget vs. actual analyses, explain significant variances, and identify financial trends or issues requiring follow-up, including timing, accrual, coding, or operational matters.
- Develop and maintain periodic operating forecasts, scenario analyses, and related financial reporting to support short- and long-term planning.
- Prepare cash flow forecasts, liquidity analyses, and treasury-related reporting for cash management, leadership, Finance Committee, Board, and investment advisor discussions.
- Partner with department leaders on recurring budget monitoring, financial review, variance follow-up, and ad hoc analysis to support informed decision-making.
- Prepare allocation, full-cost, cost recovery, funding utilization, and net yield analyses to support AUW's cost-of-doing-business and functional cost allocation framework.

- Prepare financial analyses and supporting schedules for external audit and tax engagements, United Way Worldwide reporting requirements, and grant/contract reporting needs.
- Recommend and implement reporting, process, and system improvements that increase accuracy, efficiency, transparency, and usability of financial information.
- Develop, update, and maintain financial reporting templates, budget tools, forecast files, and related SOPs.
- Provide flexible Finance team coverage during peak periods, extended absences, or staffing gaps, including support for planning, reporting, analysis, and other critical and time-sensitive priorities.

Qualifications

Education & Experience

- Bachelor's degree in accounting, finance, business administration, economics, or related field, or any combination of education and relevant experience that would provide the knowledge, skills, and abilities to perform the essential duties of this position.
- Minimum of 3–5 years of progressively responsible experience in financial analysis, budgeting, forecasting, financial reporting, accounting, nonprofit finance, audit, or a related field, including experience independently preparing budgets, forecasts, financial projections, management reporting, and/or variance analyses.
- Experience working in accounting systems, CRM systems, fundraising/donor management systems, or databases preferred.
- Nonprofit finance, accounting, grant, contract, or audit experience highly desired.

Skills & Knowledge

- Advanced proficiency in Microsoft Excel and strong proficiency in Microsoft Office Suite.
- Ability to build and maintain Excel-based budgets, forecasts, financial analyses, and reporting tools.
- Strong financial analysis, forecasting, and reporting skills.
- Strong working knowledge of finance principles and ability to interpret financial statements, budget vs. actual results, and general ledger activity.
- Ability to identify financial trends and communicate findings clearly to both finance and non-finance audiences.
- Strong accuracy, documentation, timeliness, follow-through, and ability to work with financial information requiring context and clear interpretation.
- Ability to manage multiple priorities, meet deadlines, and resolve problems effectively.
- Ability to recommend and implement reporting, process, and system improvements that increase efficiency, accuracy, or transparency.
- Collaborative, solutions-oriented, and comfortable working across departments.
- Genuine team player with an all-hands-on-deck mentality.

Employment Requirements

- Must be authorized to work in the United States.
- Must be able to pass a background check and drug test.
- Must be in Hawai'i or have pre-existing plans to relocate to Hawai'i.

Working Conditions

Work Environment

Hybrid work model after first 3 months of onboarding.

Work Hours

Full-time, Monday through Friday. Occasional early morning, evening, or weekend hours may be required during peak finance cycles, such as month-end close/reporting, quarterly Committee/Board preparation, and external audit engagements.

Equipment Use

Regular use of a computer and related office technology, including Microsoft Office, CRM, accounting systems, and virtual meeting platforms.

Mental and Physical Requirements

Must be able to perform the essential functions of this role, with or without reasonable accommodation.

- Fast-paced role requiring financial analysis, prioritization, and communication with a high degree of accuracy and timeliness.
- Ability to sit for extended periods on a computer.
- Ability to occasionally lift and carry up to 15 pounds.

Communication Requirements

Frequent verbal and written communication with internal teams and leadership.

Supervisory Requirements

None