



Accounting & Finance

15 job description templates
for accounting and finance roles

Accounting and Finance Roles

Job description templates

Tax Manager	2
Treasurer	3
Loan Officer	4
Loan Processor	5
Investment Analyst	6
Financial Officer	7
Financial Adviser	8
Underwriter	9
Financial Manager	10
Financial Controller	11
Financial Analyst	12
Chief Financial Officer (CFO)	13
Accounting Manager	14
Bookkeeper	15
Accountant	16

Tax Manager

Job description

We are looking for a professional Tax Manager. You will provide top-notch tax services and manage our company's tax operations.

- Prepare state and federal income taxes for individuals.
- Build relationships with existing and new clients.
- Take care of tax planning, tax returns, and tax risks.
- Submit and prepare formal correspondence to the IRS.
- Continuously attend trainings to learn about new laws and filing methods.
- Supervise staff accountants.
- Write business proposals for potential clients.
- Organize teams with special skill-sets for more complex projects (e.g. audits).
- Lead teams for projects that require forensic analysis.
- Prepare and review budgets.

Job benefits:

- [X] salary
- [X] vacation days
- Sick, personal, and parental leave
- Child and elder care
- Health insurance
- Retirement plans
- Professional development

Job requirements

- Certified Tax Professional, Public Accountant, or other appropriate certifications for the geographic region.
- Ability to work on a variety of projects simultaneously.
- Strong knowledge of applicable software (e.g. Quickbooks, TaxPro, Excel).
- Excellent leadership and communication skills.
- Outstanding analytical thinking and attention to detail.
- [X] year(s) experience as a Tax Manager.
- Excellent verbal and written communication in [X] language.
- [X] degree in Accounting or relevant fields.

Treasurer

Job description

We are looking for an experienced Treasurer. You will be responsible for overseeing our company financial compliance.

- Forecast borrowing needs and investment funds in order to plan for the following year.
- Ensure that the company has sufficient funds to meet capital investment requirements.
- Use strategies that help to mitigate the risk of financial losses.
- Maintain relationships with key stakeholders, partners, investors, and government officials.
- Monitor the actions of in-direct investors and other partners.
- Review transactions over [established limit] to ensure accuracy and compliance.
- Oversee financial statements, budgets, and other financial documentation.
- Present reports to the Management team, owners, and investors about the financial position of the company.
- Ensure that record-keeping procedures are in accordance with the regulatory guidelines.
- Interact with internal staff of bookkeepers, accountants, and other related personnel.

Job benefits:

- [X] salary
- [X] vacation days
- Sick, personal, and parental leave
- Child and elder care
- Health insurance
- Retirement plans
- Professional development

Job requirements

- [X] year(s) experience working in a corporate financial setting.
- Knowledge of investments, hedge funds, and international cash flow operations.
- Excellent organizing skills, analytical thinking, and strong work ethic.
- Experience with new local regulations applicable to the industry.
- Experience with international finance laws and regulations.
- Excellent verbal and written communication in [X] language.
- [X] degree in Finance, Accounting, or relevant fields.

Loan Officer

Job description

We are looking for a diligent Loan Officer. You will work with bank customers to evaluate financial information for loan approval or rejection in a timely manner.

- Check loan applications for all of the required attachments and documentation.
- Evaluate loan applications for approval/rejection by interviewing applicants and consulting applicable metrics.
- Counsel applicants on reasons for loan rejection and answer any questions.
- Obtain signatures, and any other documentation after loans are approved.
- Find opportunities to promote different loan services to potential customers.
- Offer alternative loan products to customers that may be more appropriate.
- Use electronic database to confirm loan eligibility.
- Adhere to guidelines, laws, and regulations.

Job benefits:

- [X] salary
- [X] vacation days
- Sick, personal, and parental leave
- Child and elder care
- Health insurance
- Retirement plans
- Professional development

Job requirements

- Good command of banking software/tools.
- Excellent communication and negotiation skills.
- Ability to handle client information in a secure and sensitive manner.
- [X] year(s) experience working as a Loan Officer or relevant roles in banking.
- Certification and Licensure appropriate for the geographic region.
- Excellent verbal and written communication in [X] language.
- [X] degree in Finance or relevant fields.

Loan Processor

Job description

We are looking for an accountable Loan Processor. You will work with individual customers as well as businesses to process financial loans.

- Appraise loan applications from potential clients.
- Evaluate applicant loan eligibility by conducting background research and interviews after they have submit an application.
- Explain the critical steps of the application process to loan applicants.
- Collaborate with other finance professionals (e.g. brokers, underwriters and operational staff) to build a credible referral network.
- Suggest different types of loans to potential clients based on their needs.
- Develop trust and gain buy-in from clients.
- Ensure that loans are processed in accordance with Federal regulations.
- Finalize loan contracts with new clients.
- Educate new clients about what they should do in case of default, bankruptcy, or a need to restructure payment terms for any reason.

Job benefits:

- [X] salary
- [X] vacation days
- Sick, personal, and parental leave
- Child and elder care
- Health insurance
- Retirement plans
- Professional development

Job requirements

- [X] year(s) experience working as a loan processor.
- Familiarity with Loan Processing Software, databases and other appropriate software.
- Commitment to delivering excellent service to customers.
- Knowledge of applicable laws and regulations.
- Excellent ability to spot inconsistencies or possible fraud.
- Excellent sales and communication skills.
- Excellent verbal and written communication in [X] language.
- [X] degree in Finance or relevant fields.

Investment Analyst

Job description

We are looking for an experienced Investment Analyst. You will conduct research and assess the prospective performance of different investment avenues.

- Build investment strategies by assessing current market trends, financial statements, financial models, and other indicators.
- Analyze value building activities to prepare appraisal reports.
- Gather information about the client investments to assist with valuation.
- Stay updated with market trends and new investment opportunities.
- Respond to inquiries from investors, borrowers, and other professionals.
- Research appropriate industry guidelines and regulations as needed.
- Provide information and data in a timely and efficient manner.
- Liaise with fund managers and industry professionals.

Job benefits:

- [X] salary
- [X] vacation days
- Sick, personal, and parental leave
- Child and elder care
- Health insurance
- Retirement plans
- Professional development

Job requirements

- [X] year(s) experience working as an Investment Analyst.
- In-depth understanding of financial metrics, setup, and statistics.
- Familiarity with finance investment laws and regulations.
- Strong propensity for data research and analysis.
- Experience with appropriate software systems.
- Excellent verbal and written communication in [X] language.
- [X] degree in Finance or relevant fields.

Financial Officer

Job description

We are looking for a mindful Financial Officer. You will help minimize risk and use financial strategies to take our company in a new direction.

- Contribute to the financial future of the organization by supporting tactical initiatives.
- Ensure all requisitions and payments in compliance with accounting policies, local, state and federal laws.
- Ensure financial goals are incorporated in the day to day transactions of the organization.
- Maintain total financial controls for a sustainable growth.
- Maintain the integrity and accuracy of financial data.
- Assist in the development of annual or project budgets.
- Support the annual financial audit.
- Find ways to minimize risky financial practices.

Job benefits:

- [X] salary
- [X] vacation days
- Sick, personal, and parental leave
- Child and elder care
- Health insurance
- Retirement plans
- Professional development

Job requirements

- [X] year(s) experience working in financial and administrative sectors.
- Highly organized and attentive to details.
- Great communication and presentation skills.
- Ability to analyze financial data in an efficient and accurate manner.
- Ability to maintain the highest degree of confidentiality of work.
- Strong knowledge of financial processes, financial and tax law.
- Excellent command of MS Office.
- Excellent verbal and written communication in [X] language.
- [X] degree in Finance, Business Administration, or relevant fields.

Financial Adviser

Job description

We are searching for a dynamic Financial Adviser. You are ready to expand our financial market share in a new location.

- Provide financial guidance and recommendations to make the most out of the given budget.
- Meet with prospective clients to present financial products and service.
- Develop appropriate, profitable financial plans according to clients' needs.
- Develop, track and achieve weekly goals and objectives.
- Use Customer Relationship Database to track progress with new prospects.
- Knock on doors, attend community meetings, and/or cold call to generate new leads and accomplish sales quotas.
- Ensure compliance with local, state and federal regulations.
- Collaborate with solicitors, providers, and valuers on a win-win basis.

Job benefits:

- [X] salary
- [X] vacation days
- Sick, personal, and parental leave
- Child and elder care
- Health insurance
- Retirement plans
- Professional development

Job requirements

- [X] year(s) experience as a Financial Adviser or relevant roles.
- A proven track record of sensible financial advice.
- Strong work ethic and communication skills.
- Ability to present products in a thorough and convincing manner.
- Ability to analyze complex data and provide clear solutions and guidance.
- Strong financial acumen.
- Excellent verbal and written communication in [X] language.
- [X] degree in Finance or relevant financial certifications.

Underwriter

Job description

We are looking for a passionate Underwriter. You will determine potential risks and establish terms of coverage.

- Determine the appropriate funding source and program by screening applications.
- Perform income, credit, and property analysis on applications to help achieve sound solutions.
- Review information provided in application packages and reports.
- Determine income and standard deductions for salaries, seasonal, bonus, overtime, and fixed income borrowers.
- Review tax returns and financial statements.

Job benefits:

- [X] salary
- [X] vacation days
- Sick, personal, and parental leave
- Child and elder care
- Health insurance
- Retirement plans
- Professional development

Job requirements

- [X] year(s) experience in underwriting.
- Experience in smart systems and analytical tools.
- Outstanding decision making skills.
- Excellent verbal and written communication in [X] language.
- [X] degree in Business Administration, Finance, or relevant fields.

Financial Manager

Job description

We are looking for a credible Financial Manager. You will oversee all budgeting activities and strategies to ensure senior management's well-informed decisions.

- Monitor budget development, forecasts, compensation planning, variances justification, and expense control.
- Provide timely strategic financial statements to senior management.
- Lead the development of operating budgets and make resource allocation recommendations to senior staff.
- Liaise with budget holders to support financial modeling, forecasting, and close processes.
- Manage monthly, quarterly, and annual close processes.
- Test, enhance, and maintenance reporting tools and systems.
- Ensure all associates in the department adhere to Generally Accepted Accounting Principles (GAAP).

Job benefits:

- [X] salary
- [X] vacation days
- Sick, personal, and parental leave
- Child and elder care
- Health insurance
- Retirement plans
- Professional development

Job requirements

- [X] year(s) experience in a similar role.
- Experience in researching and understanding SEC rules and GAAP.
- A proven track record of working with external auditors on audit issues.
- The ability to lead staff to drive projects to success.
- Experience in MS Office, Oracle, Essbase, and other financial applications.
- CPA certification is a plus.
- Excellent verbal and written communication in [X] language.
- [X] degree in Accounting, Finance, or equivalent.

Financial Controller

Job description

We are looking for an experienced Financial Controller. You will provide financial decision making support to our company.

- Financially assess and model new business expansion opportunities.
- Assess the financial impact of strategic changes to existing practices and policies.
- Produce accurate P&L projections by managing the cost forecast process, together with detailed analysis and KPI reporting.
- Coordinate the annual financial budgeting process to ensure alignment with stakeholders.
- Perform monthly Balance Sheet account analysis and financial statement.
- Produce comprehensive month-end accounts pack for distribution.
- Ensure that annual audit requirements are met.

Job benefits:

- [X] salary
- [X] vacation days
- Sick, personal, and parental leave
- Child and elder care
- Health insurance
- Retirement plans
- Professional development

Job requirements

- [X] year(s) experience in a similar role.
- Outstanding financial accounting ability, including assistance to GM/DP in strategic planning, Balance Sheet management, and payroll.
- Strong understanding of P&L, Balance Sheet, and Cash Flow Good.
- Analytical thinking with an ability to see the big picture while also paying attention to detail.
- A proven track record of planning and managing deliverables in a deadline-driven environment.
- Strong ability to work across different teams and communicate to all levels of management.
- Experience in MS Excel, PowerPoint, SAP.
- Excellent verbal and written communication in [X] language.
- [X] degree in Accounting, Finance, or equivalent.

Financial Analyst

Job description

We are looking for a dedicated Financial Analyst. You will analyze financial information to help our company make well-informed decisions.

- Analyze P&L and Balance Sheet activities.
- Assist in the preparation of annual budgeting process.
- Participate in month-end close.
- Contribute to financial closing process by loading data into the financial reporting system, and generating reporting on financial results.
- Provide analytical explanations of actual to budget variances.
- Develop financial models and conduct benchmarking.
- Maintain control and compliance in area of responsibility.

Job benefits:

- [X] salary
- [X] vacation days
- Sick, personal, and parental leave
- Child and elder care
- Health insurance
- Retirement plans
- Professional development

Job requirements

- [X] year(s) experience with month-end close, budget, P&L statements.
- Strong knowledge of Generally Accepted Accounting Principles (GAAP) and internal controls.
- Experience in MS Office, ERP systems like Oracle or SAP, and DBM systems like MS Access.
- Strong presentation, reporting, and communication skills.
- Excellent verbal and written communication in [X] language.
- [X] degree in Accounting, Finance, or equivalent.

Chief Financial Officer (CFO)

Job description

We are looking for an expert Chief Financial Officer. As part of the management, you will develop the vision and strategic policy of our company.

- Manage the finance department and take it to a higher level.
- Crunch data like no others.
- Budgeting, planning, and controlling.
- Make investment decisions by considering cash and liquidity capabilities and risks.
- Execute annual, monthly, weekly reports on revenues, profits, and expenses for submission to other managers, stakeholders, and external analysts.
- Initiate process and performance improvement.
- Analyze data beyond financial figures.

Job benefits:

- [X] salary
- [X] vacation days
- Sick, personal, and parental leave
- Child and elder care
- Health insurance
- Retirement plans
- Professional development

Job requirements

- [X] year(s) experience as a business analyst, strategic consultant, or controller.
- Strong knowledge of corporate financial law and financial management practices.
- Analytical thinking, stress resistance, and leadership.
- Solid communication skills, especially persuasiveness and decisiveness.
- A proven track record of managing complex financial processes.
- Excellent verbal and written communication in [X] language.
- [X] degree in Business Economics or equivalent.

Accounting Manager

Job description

We are looking for an experienced Accounting Manager. You will establish our company's financial status by monitoring day-to-day accounting activities.

- Analyze accounting data and produce financial statements.
- Oversee the daily operations of the accounting department.
- Assign responsibilities and direct staff to ensure accounting compliance and accuracy.
- Coordinate annual audits and enforce proper Generally Accepted Accounting Principles (GAAP).
- Process month and end year process, general ledger, treasury, budgeting, revenue and expenditure variance analysis, capital assets reconciliations, debt activity, etc.
- Train, manage, and schedule accounting staff and assistants/interns.
- Attend training to understand new Tax Compliance issues and information.
- Provide training for staff accountants regarding new legislation/compliance issues.
- Assist with Annual Audits and other internal/external projects.

Job benefits:

- [X] salary
- [X] vacation days
- Sick, personal, and parental leave
- Child and elder care
- Health insurance
- Retirement plans
- Professional development

Job requirements

- [X] year(s) experience in accounting managing.
- Ability to lead and motivate an accounting team.
- Experience in managing big data and handling a variety of management tasks.
- Strong knowledge of GAAP.
- CPA or other relevant certifications.
- High proficiency in Microsoft Office, accounting software and databases.
- Excellent verbal and written communication in [X] language.
- [X] degree in Finance, Accounting, or equivalent.

Bookkeeper

Job description

We are looking for a solid Bookkeeper. You master accounting skills including general ledger and payroll.

- Prepare Generally Accepted Accounting Principles (GAAP) monthly financial statements.
- Maintain A/P, A/R, and account ledgers.
- Reconcile bank and credit card statements.
- Manage cash management reports.
- Process and document HR benefits and records.

Job benefits:

- [X] salary
- [X] vacation days
- Sick, personal, and parental leave
- Child and elder care
- Health insurance
- Retirement plans
- Professional development

Job requirements

- [X] year(s) experience in bookkeeping.
- Meticulous attention to detail.
- Experience in Quickbooks.
- High proficiency in Microsoft Office.
- Excellent verbal and written communication in [X] language.
- [X] degree in Finance, Accounting, or equivalent.

Accountant

Job description

We are looking for a professional Accountant. You are adept at accounting services and play a key role in our company's growth.

- Investigate variances in various revenue and expense accounts.
- Develop and maintain accounting policy and procedure documents.
- Conduct analytic reviews of accounting results.
- Publish financial statements.
- Oversee transactions and data interface status in the system.
- Communicate effectively with multiple groups including system technicians, tax personnel, office personnel, SOA Control and Analysis, GL controllers, etc.
- Exercise G/L entries and cash movements as needed.

Job benefits:

- [X] salary
- [X] vacation days
- Sick, personal, and parental leave
- Child and elder care
- Health insurance
- Retirement plans
- Professional development

Job requirements

- [X] year(s) experience in accounting.
- A strong understanding of Generally Accepted Accounting Principles (GAAP).
- An ability to work independently, solve problems, adapt quickly to changes in a fast-paced environment.
- A proven track record of managing multiple projects and deliverables to aggressive deadlines.
- High proficiency in Microsoft Excel.
- CPA is a plus.
- Excellent verbal and written communication in [X] language.
- [X] degree in Accounting or equivalent.



facebook.com/recruitee/

twitter.com/recruitee

linkedin.com/company/recruitee/

recruit.ee/tainnovators/

blog.recruitee.com/