



**YOUR HIRING PARTNERS**  
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*A division of Consult P<sup>3</sup>*

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1717 Arts Plaza #1907  
Dallas, TX 75201



## Job Title

Reporting Analyst

## Company

Confidential

## Location

Plano, TX

## Job Type

Full-time

## Industry

Insurance / Banking

## Salary

\$38,000-\$44,000

## About the Company

Our client is a small, privately owned company with over 25 years of experience in the business of providing community banks throughout the country with simple and complex benefit and incentive programs to help them attract and retain qualified executives and remain independent.

## Job Description

Under general supervision, and acting on own initiative and direction, but in line with established procedures, performs a variety of simple and complex service administrative duties to be completed in a timely and accurate manner.

## Responsibilities

- Manage service calendar to ensure various servicing deadlines are met.
- Process all new client and prospect requests.
- Process and track client billing statements.
- Work with Service Manager to ensure all clients are satisfied on all levels of services provided.
- Manage service calendar to ensure various servicing deadlines are met.
- Setup and follow standardized processes and procedures to ensure all reports are consistent and correct.
- Design creative and effective service materials to support our overall business strategy.
- Maintain data within a proprietary database.
- Setup and maintain accrual schedules and statements applying proper accounting and legal rules.
- Ensure the accuracy of all service reports based on provided legal documents and by performing simple and complex calculations to verify accrual schedules and projected payout amounts.
- Complete and deliver service reports/presentations to all clients for monthly, quarterly, and annual reporting.
- Maintains 100% confidentiality regarding corporate and client information.

## Experience and Qualifications

The ideal candidate for this position would be someone with customer service or equivalent experience who is highly organized and an articulate communicator who is also a critical and creative thinker.

- Ability to prioritize and perform multiple tasks simultaneously by establishing priorities, planning, and anticipating potential issues to meet deadlines and client expectations.
- Must take ownership and initiative to ensure client expectations are met, including follow through, follow up, and understanding when and how to involve others.
- Proficiency in Excel, Word, Outlook and FileMaker Pro.
- Advanced knowledge of Outlook, MS Office and QuickBooks.
- Experience in Mail Merge and Contact Management Database preferred
- Experience or exposure to banking or financial industries a plus.

## Education

- Bachelor's Degree or relevant, equivalent experience.

## Benefits

- Competitive salary
- Medical, dental, and vision
- 401K, paid vacation and holidays

\*\*\*\*\* LOCAL CANDIDATES ONLY, NO RELOCATION IS OFFERED WITH THIS POSITION. \*\*\*\*\*

## Application Questions

Candidates will be required to answer the following questions when an application is submitted.

- How many years of **Banking or Financial** experience do you have?
- How many years of **Excel** experience do you have?
- How many years of **Microsoft Office** experience do you have?
- How many years of **FileMaker Pro** experience do you have?
- How many years of **QuickBooks** experience do you have?
- How many years of **Mail Merge and Contact Management Database** experience do you have?