

JOB TITLE:

Data Analyst (Excel)

FLSA:

Non-Exempt

DEPARTMENT:

Securities and Consumer Fraud

REPORTS TO:

Attorney/Director of Shareholder Services

SUMMARY:

This position is primarily responsible for formatting and analyzing financial instrument trading data in Excel and other data tools, and creating tables and charts to present data.

MINIMUM REQUIREMENTS:

- Associate's or Bachelor's Degree in Data Management/Analytics, Finance, Business or a related field, or equivalent experience
- Two (2) or more years of data manipulation and analysis
- Advanced Excel skills, including charts, PivotTables, VLOOKUP, INDEX MATCH, etc.
- Ability to perform and prioritize multiple tasks efficiently in a fast pace shared environment.
- Demonstrates the adaptability to quickly analyze data accurately.
- Must be detail oriented and accurate.
- Knowledge of financial markets and instruments (stocks and bonds) and financial reporting requirements a plus
- Strong written and verbal communication skills

ESSENTIAL DUTIES AND RESPONSIBILITIES:

"Essential functions" are primarily job duties that incumbents must be able to perform unassisted or with some reasonable accommodation made by the employer.

- Analysis of institutional and individual shareholder data
- Assemble spreadsheets; create charts and tables to illustrate data in court filings
- Gather financial information and calculate losses for equities, bonds, and other securities
- Analyze client data in settled cases, including review of plan of allocation and calculation of estimated recognizable losses
- Assist the firm with its Portfolio Monitoring program for institutional investors
- Opportunities to perform securities-related research if desired, including researching new case filings and analyzing economic, industrial, or corporate developments impacting clients and investments

WORKING HOURS:

Work may require more than 40 hours per week to perform the duties of the position.

WORKING CONDITIONS:

Work is performed in a normal heated or air-conditioned office environment.

The above is intended to describe the general content of and requirements for the performance of this job. It is not to be construed as an exhaustive statement of essential functions, responsibilities or requirements.

This job description must not be misconstrued as a promise of employment, nor deemed as an employment contract.