



New Mexico State Personnel Office

2600 Cerrillos Road
Santa Fe, New Mexico 87505-0127

Classification Description

FINANCIAL ANALYST SUPERVISOR

<u>Class Title</u>	<u>Class Code</u>	<u>Pay Band</u>	<u>Alt Pay Band*</u>
Financial Analyst Supervisor	C2051S	75	

**In accordance with SPB Rule 1.7.4.10 NMAC, the assignment to alternative pay bands shall be reviewed annually to determine their appropriateness.*

Purpose

Devotes a substantial portion of time assigning and directly supervising work of at least two (2) full time equivalent employees**, acting upon leave requests, conducting annual performance evaluations and recommending disciplinary actions. Interviewing and recommending selection of applicants and conducting training of personnel. Conduct quantitative analyses of information affecting investment programs of public or private institutions.

Nature of Work

The Financial Analyst Supervisor devotes a substantial portion of time assigning and directly supervising work of at least two (2) full time equivalent employees and provides guidance to businesses and individuals making investment decisions. Financial analysts assess the performance of stocks, bonds, commodities, and other types of investments. They work for banks, insurance companies, mutual and pension funds, securities firms, the business media, and other businesses, making investment decisions or recommendations. Financial analysts study company financial statements and analyze commodity prices, sales, costs, expenses, and tax rates to determine a company's value by projecting its future earnings. They often meet with company officials to gain a better insight into the firms' prospects and management.

Distinguishing Characteristics

The omission of specific statements does not preclude management from assigning other duties which are reasonably within the scope of the duties.

- Devotes a substantial portion of time assigning and directly supervising work of at least two (2) permanent/full time employees. Acts upon leave requests, conducts annual performance evaluations and recommends disciplinary actions.
- Conducts training of personnel; may interview and recommend selection of applicants.
- Provides career coaching through mentoring and arranges for outside training opportunities when possible.
- Makes well-informed, effective, and timely decisions and perceives the impact and implications of those decisions.
- Makes point of view in a clear and convincing manner.
- Listens effectively and clarifies information as needed.
- Identifies and analyzes problems; weighs relevance and accuracy of information; generates and evaluates alternative solutions; makes recommendations.
- Writes in a clear and concise manner.

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- Develops networks and builds alliance; collaborates across boundaries to build strategic relationships and achieve common goals.
- Builds and manages workforce based on organizational goals, budget considerations, and staffing needs
- Ensures that employees are appropriately recruited, selected, and appraised; addresses performance issues.
- Keeps up to date on occupationally specific technological developments; makes effective use of technology to achieve results.
- Employees in this Role negotiate and conduct investment transactions.
- Performs highly responsible technical work involving formulation and direction of an overall investment program.
- Performs full range of program, policy and budget analysis.
- Conducts studies involving budgeting, management, organization, and related administrative problems for the most complex agencies having multiple funding sources, many diverse programs, and a high level of sensitivity/visibility.
- Serves as specialist/staff advisor in the evaluation of data processing plans, personnel management services, economic forecasting and budget analysis.
- Exercises considerable discretion in approval/disapproval of securities registration.
- May perform comprehensive fiscal analysis for local governments.

Recommended Education and Experience for Full Performance***

Bachelor's Degree in Accounting, Finance or Business Administration and six (6) years of experience in accounting, finance, economics and/or statistical analysis, three (3) years of which must be supervisory.

Minimum Qualifications

Bachelor's Degree in Accounting, Finance or Business Administration and four (4) years of experience in accounting, finance, economics and/or statistical analysis. Any combination of education from an accredited college or university in a related field and/or direct experience in this occupation totaling eight (8) years may substitute for the required education and experience.

Knowledge and Skills

*Note: This information has been produced by compiling information and documentation provided by O*NET. O*NETTM is a trademark of the U.S. Department of Labor, Employment and Training Administration.*

Knowledge

Leadership - Knowledge of leading through influence and persuasion by establishing mutual trust, respect, and loyalty, through shared beliefs, values, and goals; Being cognizant of subordinates' needs, goals, and aspirations, and to carefully consider these personal variables when making decisions.

Economics and Accounting — Knowledge of economic and accounting principles and practices, the financial markets, banking and the analysis and reporting of financial data.

English Language — Knowledge of the structure and content of the English language including the meaning and spelling of words, rules of composition, and grammar.

Mathematics — Knowledge of arithmetic, algebra, geometry, calculus, statistics, and their applications.

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Computers and Electronics — Knowledge of circuit boards, processors, chips, electronic equipment, and computer hardware and software, including applications and programming.

Law and Government — Knowledge of laws, legal codes, court procedures, precedents, government regulations, executive orders, agency rules, and the democratic political process.

Administration and Management — Knowledge of business and management principles involved in strategic planning, resource allocation, human resources modeling, leadership technique, production methods, and coordination of people and resources.

Customer and Personal Service — Knowledge of principles and processes for providing customer and personal services. This includes customer needs assessment, meeting quality standards for services, and evaluation of customer satisfaction.

Skills

Leadership - Displaying attributes that makes employees willing to follow; applying effort to increase productiveness in areas needing the most improvement; establishing a spirit of cooperation and cohesion for achieving goals; making the right things happen on time; providing performance feedback, coaching, and career development to individuals to maximize their probability of success; giving subordinates the authority to get things accomplished in the most efficient and timely manner.

Critical Thinking — Using logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions or approaches to problems.

Reading Comprehension — Understanding written sentences and paragraphs in work related documents.

Writing — Communicating effectively in writing as appropriate for the needs of the audience.

Speaking — Talking to others to convey information effectively.

Active Listening — Giving full attention to what other people are saying, taking time to understand the points being made, asking questions as appropriate, and not interrupting at inappropriate times.

Complex Problem Solving — Identifying complex problems and reviewing related information to develop and evaluate options and implement solutions.

Judgment and Decision Making — Considering the relative costs and benefits of potential actions to choose the most appropriate one.

Mathematics — Using mathematics to solve problems.

Active Learning — Understanding the implications of new information for both current and future problem-solving and decision-making.

Monitoring — Monitoring/Assessing performance of yourself, other individuals, or organizations to make improvements or take corrective action.

Statutory Requirements: N/A

Conditions of Employment: Working Conditions for individual positions in this classification will vary based on each *agency's utilization, essential functions*, and the *recruitment needs* at the time a vacancy is posted. All requirements are subject to possible modification to reasonably accommodate individuals with disabilities.

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Default FLSA Status: Exempt. FLSA status may be determined to be different at the agency level based on the agency's utilization of the position.

Bargaining Unit: N/A

Established: 04/27/2012

Revised:

***Means two (2) or any combination of full-time equivalent (FTE) status that equals at least two (2) regular or term status employees in non-temporary positions.*

****Adapted from the United States Bureau of Labor Statistics and are intended to illustrate the typical education and experience required for this occupation. Not to be construed as minimum qualifications.*

Note: Classification description subject to change. Please refer to the SPO website www.spo.state.nm.us to ensure this represents the most current copy of the description.