

Senior Financial Analyst

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Company: Oportun, Inc

Location: Mexico

Category: computer-and-mathematical

ABOUT OPORTUN

Oportun (Nasdaq: OPRT) is a digital banking platform that puts its 1.9 million members' financial goals within reach. With intelligent borrowing, savings, budgeting, and spending capabilities, Oportun empowers members with the confidence to build a better financial future. Since inception, Oportun has provided more than \$15.5 billion in responsible and affordable credit, saved its members more than \$2.3 billion in interest and fees, and helped our members save an average of more than \$1,800 annually. For more information, visit .

WORKING AT OPORTUN

Working at Oportun means enjoying a differentiated experience of being part of a team that fosters a diverse, equitable and inclusive culture where we all feel a sense of belonging and are encouraged to share our perspectives. This inclusive culture is directly connected to our organization's performance and ability to fulfill our mission of delivering affordable credit to those left out of the financial mainstream. We celebrate and nurture our inclusive culture through our employee resource groups.

POSITION OVERVIEW

The Senior Financial Analyst will be on a rapid growth track to take on an increasing scope of responsibility within the Financial Planning & Analysis team, playing a critical role in the following:

1. Financial Planning: Partner with business leaders to produce monthly and multi-year

financial forecasts that provide a roadmap for the company to achieve its strategic objectives.

2. **P&L Review:** Support the monthly P&L review process that includes explaining variances to plan, providing insight on current and expected trends, and identifying areas of risk and opportunities.

3. **Financial Analysis:** Conduct complex financial cost/benefit analyses to support growth and other strategic initiatives.

4. **Reporting:** Manage daily, weekly, monthly, and quarterly financial and KPI reporting requirements, including preparing materials for the Board of Directors and other key constituents.

5. **Business Intelligence:** Partner with the Enterprise Analytics team to create and automate a business intelligence framework to support FP&A and other business objectives.

6. **Capital Markets:** Support capital markets initiatives that may include analyses related to funding the loan portfolio and overall enterprise, covenant reporting, and other tasks as needed.

7. **Other:** Other ad hoc support and analyses as needed.

RESPONSIBILITIES

The Senior Financial Analyst will be on a rapid growth track to take on an increasing scope of responsibility within the Financial Planning & Analysis team, playing a critical role in the following:

Financial Planning: Partner with business leaders to produce monthly and multi-year financial forecasts that provide a roadmap for the company to achieve its strategic objectives.

P&L Review: Support the monthly P&L review process that includes explaining variances to plan, providing insight on current and expected trends, and identifying areas of risk and opportunities.

Financial Analysis: Conduct complex financial cost/benefit analyses to support growth and other strategic initiatives.

Reporting: Manage daily, weekly, monthly, and quarterly financial and KPI reporting requirements, including preparing materials for the Board of Directors and other key constituents.

Business Intelligence: Partner with the Enterprise Analytics team to create and automate a business intelligence framework to support FP&A and other business objectives.

Capital Markets: Support capital markets initiatives that may include analyses related to funding the loan portfolio and overall enterprise, covenant reporting, and other tasks as needed.

Other:Other ad hoc support and analyses as needed.

REQUIREMENTS

Education:Bachelor's Degree in Finance, Economics, Engineering, Mathematics, or other analytical discipline.

Professional Experience: 3+ years of experience in a finance or analytical role, preferably in the consumer financial services industry.

Modeling Experience:Experience with cash flow and three-statement financial modeling. Working knowledge of key financial concepts such as NPV, IRR, ROE, etc.

Tools:Advanced Microsoft Excel skills.

Intellect:Exceptional problem solving and analytical skills with the ability to maintain the highest standard of integrity, accuracy, and precision.

Soft Skills:Excellent listening, written, and oral communication skills. **Personality:** Highly motivated, dynamic, and willing to do what it takes to get the job done.

NICE TO HAVE BUT NOT REQUIRED

Education: Master's Degree in Business (MBA), Finance, or other analytical discipline.

Tools:Python, SQL, or other relationship database experience.

We are proud to be an Equal Opportunity Employer and consider all qualified applicants for employment opportunities without regard to race, age, color, religion, gender, national origin, disability, sexual orientation, veteran status or any other category protected by the laws or regulations in the locations where we operate.

California applicants can find a copy of Oportun's CCPA Notice here: .

We will never request personal identifiable information (bank, credit card, etc.) before you are hired. We do not charge you for pre-employment fees such as background checks, training, or equipment. If you think you have been a victim of fraud by someone posing as us, please report your experience to the FBI's Internet Crime Complaint Center (IC3).

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