

Reporting & Audit Specialist

Job Brief

The Reporting & Audit Specialist is primarily responsible for facilitating all facets of customer reporting, preparation of internal management reporting, and planning and coordination of all company and customer audits. This position requires an individual with a solid knowledge of Microsoft Office products with particular focus on Excel, a pro-active and detail-oriented mindset with focused and consistent follow-through, and the ability to foster strong working relationships with internal and external customers and state regulatory personnel.

RESPONSIBILITIES:

- Facilitate creation and distribution of monthly reports for external and internal customers
- Prepare consolidated management reporting for external customers
- Manage customer reporting setup and changes, for trust and recordkeeping reports
- Create internal management reporting for MBR and board meetings
- Validate, create, and distribute all state annual reports or periodic required filings
- Coordinate preparations and manage audits by state regulators and company engaged auditors
- Troubleshoot reporting issues and work with internal and external customers to resolve issues
- Direct and validate systems changes required for reporting modifications & enhancements
- Monitor Return Track (performance reporting system) and troubleshoot issues
- Work independently to complete assigned tasks on a timely basis with minimal errors
- Effectively work with administrative and operational personnel
- Provide administrative and analytical support to the bank
- Identify and implement process improvements to current position
- Work with team to complete special projects as needed

REQUIREMENTS:

- Four year college degree in business or related field, or similar work experience
- Knowledge and demonstrated use of Microsoft Office products: Excel, Word, Powerpoint and Access, with a particular emphasis on Excel
- Experience with reporting and query tools and knowledge of database structure and queries a plus
- Continuous improvement, deadline and detail-oriented mindset
- Demonstrated problem solving, decision making, and communication skills, both written and spoken
- Ability to take on additional responsibilities as needed
- Willingness to work additional time as required for projects and job tasks
- Ability to work independently with minimal supervision
- Project management experience a plus

Qualified applicants can submit a resume to careers@clearpointfederal.com