

Job Description

Position Title: Data & Reporting Analyst

Department: Finance

Reports To: Controller

Position Summary:

The Data & Reporting Analyst supports the Finance team by collecting, organizing, analyzing, and reporting financial and operational data across the credit union. This role assists in preparing internal management reports, regulatory reporting, and data analysis that support decision-making across departments.

Working closely with the Controller and Finance team, the analyst ensures data accuracy, improves reporting processes, and helps build dashboards and automated reports to support financial oversight and operational insights.

Key Responsibilities

Data Management & Reporting

- Collect, consolidate, and validate data from core banking systems, financial systems, and operational databases.
- Prepare recurring reports including Monthly financial performance reports, Branch performance dashboards, Deposit and loan portfolio reporting, Key operational metrics

Financial & Operational Analysis

- Support the Controller with variance analysis and financial reporting.
- Assist in analyzing trends related to: Deposits and lending, Member growth, Product performance, Branch performance

Regulatory & Compliance Reporting

- Assist with regulatory reporting requirements.
- Support preparation of periodic financial reports required by regulators and internal auditors.

Dashboard & Reporting Tools

- Build and maintain dashboards using tools such as: Excel, Power BI / Tableau, SQL queries
- Improve automation of manual reports and reporting processes.

Data Quality & Process Improvement

- Identify inconsistencies in data and work with relevant departments to resolve issues.
- Support improvements in reporting workflows and data governance practices.

Cross Department Support

- Work with cross-functional teams to provide data insights.
- Respond to ad-hoc data requests from leadership.
- Support projects involving system upgrades, reporting enhancements, or digital initiatives.

Education

- Bachelor's degree in: Finance, Accounting Data Analytics Business Administration

Experience

- 3–5+ years of experience in data analytics, reporting, or business intelligence roles, preferably within a financial institution, credit union, or banking environment
- Proven experience working with core banking systems (e.g., Temenos, Fiserv, or similar) and integrating data from multiple financial platforms
- Strong proficiency in data visualization and reporting tools such as Power BI, Tableau, or similar BI platforms
- Advanced SQL skills with experience in querying, transforming, and managing large datasets
- Experience with data modeling, data warehousing concepts, and ETL processes
- Demonstrated ability to build automated dashboards and recurring reports to support business decision-making
- Strong understanding of financial products (lending, deposits, wealth management) and related performance metrics
- Experience supporting regulatory, compliance, and audit reporting requirements