

JOB DESCRIPTION

JOB TITLE: Senior Financial Analyst

DEPARTMENT: Finance

REPORTS TO: CFO

DATE OF THIS REVISION: 9/2025

BASIC PURPOSE OF THIS JOB:

Is the owner of and responsible for data accuracy and integrity for the organization. Develops reporting to meet the needs of the organization regarding insurance related data including but not limited to policy counts, premiums, losses, exposures, and claims counts. Performs analysis of data to identify trends. Supports the external reporting structure of the Finance and Actuarial department. Works across the organization with members of the Leadership Team to provide data to support their specific needs.

REQUIRED QUALIFICATIONS AND SKILLS:

- Degree in Finance or Accounting.
- 5+ years experience with continual growing responsibility in financial operations in the finance field.
- Experience in queries and report writing in various report writing tools.
- Deep commitment to the accuracy and integrity of data.
- Independent self starter.
- Have a high level of energy with the ability to adjust to any justifiable pace.
- Easy going and cooperative disposition.

DESIRED QUALIFICATIONS AND SKILLS:

- MBA or CPA desirable but not required.
- Creative curiosity to wonder "what if".
- Ability to change channels and have many competing projects in place at the same time.
- Exhibit behavior which emphasizes quality, loyalty and conscientiousness.
- Passionate about insurance.

WORKING CONDITIONS:

- Ability to work long hours
- Ability to sit for long periods of time
- Remote working environment utilizing a "work for your day" mentality

ESSENTIAL FUNCTION #1: OBJECTIVE: Oversee and monitor data accuracy and integrity across the organization. Develop and maintain companywide reporting system utilizing MicroStrategy and the data warehouse. Oversee and review the transition of core finance reports from MicroStrategy to Microsoft Fabric. Recreate/develop financial reports and analyses in Power BI.

Percent of time: 35%

ESSENTIAL FUNCTION #2: OBJECTIVE: Support all departments individual data and reporting needs.

Percent of time: 35%

ESSENTIAL FUNCTION #3: OBJECTIVE: Support Finance department external reporting needs. Provide actuarial team with needed data.

Percent of time: 25%

ESSENTIAL FUNCTION #4: OBJECTIVE: Other duties as determined

Percent of time: 10%

NOTE: Job duties and/or qualifications are subject to change at any time.

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We offer competitive wages, a comprehensive and highly sought-after benefits package including health, dental, vision, life insurance, long term disability, employee assistance program, 401(k) plan, pension, short term disability, paid time off and holidays, and a great work environment with fun, friendly people who truly enjoy their work. Hiring range for this position is \$102,506/salary to \$128,133/salary.