Financial Analyst

The Yuba Group LLC

Company Description

The Yuba Group LLC is a advisory firm founded in 2010 which provides financial analysis and advice to national higher education institutions. Our objective is to provide customized consulting services and assistance with the issuance and management of capital market debt, derivatives and other financial products. We seek to develop close, collaborative relationships with our clients in developing an analytical framework to guide and inform various financing and capital decisions. Our approach reflects the extensive, hands-on experience of our partners in higher education, credit rating agencies, consulting and investment banking firms.

Job Description

This is a full-time position for an Analyst to assist the firm's senior professionals. We are seeking a highly motivated individual who enjoys working at a small firm and who has strong analytical and technical skills to focus on financial modeling and related analysis including:

- Creating and utilizing complex Excel models related to debt, swaps and financial ratios;
- Maintaining proprietary firm databases, including financial statement data entry and verification;
- Using database information to generate debt capacity and other peer analyses;
- Monitoring relevant tax-exempt and corporate fixed income transactions, both in the primary and secondary markets;
- Developing insightful, visually interesting and attractive graphs and tables that present information and data in a clear and organized manner;
- Researching and organizing financial and credit information for higher education and not-for-profit institutions;
- Interacting with colleagues and clients to analyze and present quantitative information, possible implications of various decisions and recommended approaches;
- Preparing presentation materials and memoranda describing market conditions and opportunities, including various financing options with pros/cons/risks/opportunities;
- Assisting in the maintenance and development of our client-specific web portal which provides market data and financial information; and
- Reviewing other analyses and materials prepared by colleagues, clients and third parties for accuracy and consistency.

Desired Experience and Skills

Our ideal candidate has the following skills and experience:

- Familiarity with financial modeling and quantitative analysis;
- Understanding of financial statements and ratios;
- Well-developed Excel skills including modeling and graphing;
- Ability to learn quickly and become familiar with new financial software/tools, including DBC Finance (municipal bond structuring software) and Bloomberg;
- Excellent organizational and communication skills;
- Ability to work well under pressure and meet deadlines;
- Ability to work independently and thoughtfully, while also knowing when to seek guidance and ask questions;
- Strong work ethic, attention to detail and a genuine interest in working with higher education and not-for-profit institutions;
- Ability to work well in an intimate, collaborative environment focused on client relationships; and
- Willingness to travel to meet with and present to clients; and
- Demonstrated ability to exercise good judgment and conduct oneself with professionalism.

Minimum Qualifications:

- BA or BS with extensive coursework in finance, economics and/or business required;
- Proficiency in MS Excel, MS PowerPoint and MS Word;
- Interest in the capital markets and fundamental financial concepts;
- Prior work experience, preferably in a related field; and
- Desire to work with higher education and not-for-profit institutions

For additional information about The Yuba Group, please visit our website at www.yubagroup.com.

Please submit a cover letter, resume, and transcript to recruiting@yubagroup.com. Applications without a cover letter will not be considered.

Job Function: Consulting, Financial Services

Posted: January 2024

Position Type: Full-time/Permanent

Travel Percentage: 0-2 days/month

Location: NYC preferred; Boston or SF area are also options for the right candidate