

**APPLY IN PERSON AT:**  
Human Resource Department  
909 Packerland Dr  
Green Bay, WI 54303

**OR MAIL TO:**  
Human Resource Department  
P.O. Box 365  
Oneida, WI 54155-0365



**APPLY ONLINE AT:**  
<http://oneida-nsn.gov>

Phone: (920) 496-7900  
Fax: (920) 496-7490

**POSITION TITLE:** Financial Analyst  
**POSITION NUMBER:** 01528  
**DEPARTMENT:** Trust  
**LOCATION:** 909 Packerland Dr Green Bay WI  
**DIVISION:** Non-Divisional  
**RESPONSIBLE TO:** Trust Enrollment Director  
**SALARY:** E06 \$52,855/Annually (NEGOTIABLE DEPENDING ON EDUCATION & EXPERIENCE)  
**(Employees will receive 5% below the negotiated pay rate during their probationary status.)**  
**CLASSIFICATION:** Exempt  
**POSTING DATE:** April 6, 2018  
**CLOSING DATE:** Until Filled  
**Transfer Deadline:** April 13, 2018  
**Proposed Start Date:** As Soon As Possible

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**EQUAL EMPLOYMENT OPPORTUNITY STATEMENT**

The Oneida Nation does not discriminate on the basis of race, color, national origin, sex, religion, age or disability status in employment or the provision of services. However, individuals of Indian ancestry and Veterans will be given preference by law in initial employment or re-employment.

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**POSITION SUMMARY**

This position will develop and implement strategic investment plans to enhance portfolio performance and reduce risk level in accordance with applicable laws, regulations, policies and procedures. Continuation of this position is contingent upon funding allocations.

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**DUTIES AND RESPONSIBILITIES:**

1. Assist in the development of asset allocation strategies to enhance portfolio performance and to reduce risk.
  - a. Analyze economic and financial information to forecast business, industry, and economic conditions and their impacts on Trust portfolios.
  - b. Assess investment opportunities by keeping abreast of current economic trends; proposes changes in asset allocation.
  - c. Recommend buying or selling of stocks, bonds and mutual funds, and implement authorized trades.
  - d. Observe and monitor portfolio performance versus benchmark indexes and peer groups.
  - e. Assist in developing new investment strategies for utilizing the assets currently under management, including but not limited to, new asset classes and/or community investments.
  - f. Assist in monitoring accounts to ensure sustainable and responsible investing is followed.
2. Provide technical support for systems compliance and portfolio monitoring, reports on performance, communicates with money managers, and researches alternative and sustainable and responsible investments.
  - a. Assist in research and selection of appropriate software systems.
3. Assist with compliance and improvement of the Investment Policy; develop a working knowledge and understanding of Oneida Trust Enrollment policies, structure and history.
4. Work closely with the Trust Enrollment staff to continually improve investment operations and reduce costs.
  - a. Attend department and committee meetings as required.
5. Provide reports to the Director on a monthly basis on activities, recommendations and future objectives.
  - a. Develop and present required reports to the GTC, BC and Trust Enrollment Committee.
6. Maintain professional and technical knowledge by conducting research, attending seminars, educational workshops, classes and conferences; reviewing professional publications; establishing networks; participating in professional societies; conferring with representatives of contracting agencies and related organizations.
7. Adhere to all Oneida Nation Personnel Policies and Procedures, Departmental Standard Operating Procedures, and Area and Program Strategic Plans and Policies.
8. The above duties and responsibilities are not an all-inclusive list but rather a general representation of the duties and responsibilities associated with this position. The duties and responsibilities will be subject to change based on organizational needs and/or deemed necessary by the supervisor.

**JOB DESCRIPTION  
FINANCIAL ANALYST  
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**DUTIES AND RESPONSIBILITIES (Cont.):**

9. The above duties and responsibilities are not an all-inclusive list but rather a general representation of the duties and responsibilities associated with this position. The duties and responsibilities will be subject to change based on organizational needs and/or deemed necessary by the supervisor.

**PHYSICAL REQUIREMENTS/WORK ENVIRONMENT:**

1. Frequently walk, sit; occasionally stand, lift and/or move up to twenty-five (25) pounds.
2. Work is generally performed in an office setting with a moderate noise level.
3. A Tuberculosis (TB) Screening and/or TB Skin Test is required within thirty (30) days of employment and annually thereafter as required.

**STANDARD QUALIFICATIONS:**

1. Knowledge of applicable federal, state, and local laws, regulations, and requirements.
2. Knowledge of department organization, functions, objectives, policies and procedures.
3. Knowledge of various Trust Funds, and Investment Portfolio and Finance structures.
4. Knowledge in the investment, legal and tax issues relative to trust management and administration.
5. Skill in operating various word-processing, spreadsheets, and database software programs in a Windows environment.
6. Skill in preparing, reviewing, and analyzing operational and financial reports.
7. Ability to analyze market conditions from a variety of resources.
8. Ability to exercise independent judgment.
9. Ability to work independently and meet strict time lines.
10. Ability to communicate efficiently and effectively both verbally and in writing.
11. Ability to establish and maintain good working relationships with the individuals of varying social and cultural backgrounds
12. Must adhere to strict confidentiality in all matters. **(Must sign a confidentiality statement prior to employment.**
13. Must be willing and able to obtain additional education and training.
14. Must pass a pre-employment drug screening. Must adhere to the Oneida Nation's Drug and Alcohol Free Workplace Policy during the course of employment.
15. Must pass a background security check with the Oneida Nation in order to meet the Employment Eligibility Requirements, Tribal/State Compact and/or Oneida Nation Gaming Ordinance as they pertain to the position. A temporary license or Gaming License issued by the Oneida Gaming Commission is required as a condition of employment and continuing employment within the Oneida Nation's Gaming Division.
16. A valid, non-probationary driver's license or occupational driver's license, reliable transportation, and insurance are required. Must obtain a Wisconsin non-probationary driver's license or occupational driver's license within thirty (30) days of employment if applicant has an out-of-state driver's license. Must be authorized as eligible to operate a personal and Tribal vehicle under the Oneida Nation's Vehicle Driver Certification and Fleet Management Policy prior to actual start date. Must maintain driver's eligibility as a condition of employment.

**PREFERRED QUALIFICATIONS:**

**Applicants please clearly state on the application/resume if you meet these qualifications.**

1. Chartered Financial Analyst (CFA).

**MINIMUM QUALIFICATIONS:**

**Applicants please clearly state how you meet these qualifications on the application/resume.**

1. **Must be an enrolled member of the Oneida Nation.**
2. Bachelor's Degree in Finance, Economics or Business Administration; two (2) year's work experience in financial investment; an equivalent combination of education and experience may be considered.

**ITEMS TO BE SUBMITTED:**

1. **Must provide a copy of diploma, license, degree or certification upon employment.**