



# Pin Oak Group, LLC

Job Title: Financial Planning & Analysis Manager	Reports To: CFO
Department: Finance	Hourly/Salary: Salary
Date Approved:	Job Location: San Antonio or Houston

## **General Summary**

The Financial Planning & Analysis (FP&A) Manager is responsible for the management reporting, budgeting, forecasting, and economic evaluation processes and tools for Pin Oak Group, LLC (“Company”), preparing useful analysis of results and performance for the executive team and management in support of performance improvement. The FP&A Manager also supports the EVP of Strategy & Business Development to provide modeling and other meaningful analysis of growth opportunities.

## **Essential Functions**

- Manages development and use of budgeting, forecasting, and economic/valuation tools and models. Provides economic modeling support for Company strategic growth efforts, including organic investments and M&A activity
- Prepares monthly financial reports and quarterly performance review packages for company executives and board of directors
- Analyzes current and past trends in key performance indicators for all areas of revenue, expense, and capital investment. Highlights trends, determining causes for unexpected variance
- Develops monthly, quarterly, and annual forecasts to accurately reflect current expectations of the business in collaboration with the CFO and other business leaders.
- Prepares and reviews on an ongoing basis the profitability of customers and business segments
- Provides support for treasury function to CFO and VP of Finance & Accounting
- Serves in other roles for Company as directed by CFO and broader executive team, opportunity for leadership and cross functional development (think Swiss Army Knife)

## **Competencies, Education, Knowledge, Skills and Abilities**

- Required Bachelor's degree in economics, business, mathematics, engineering, or other field demonstrating high quantitative and reasoning capabilities
- Minimum of 3 years relevant experience in economic modeling, FP&A, and/or investment banking or related discipline. Not all experience considered equal.
- Advanced level of expertise in MS Excel, MS PowerPoint, MS Word required. Attention to detail and accuracy a must
- Must be able to build a robust economic/valuation model "from scratch", and must be able to present the assumptions, methodology, and results in a clear and concise way in a management presentation (speaking from PowerPoint slides and MS Excel Model). This capability will be tested in the second round of interviews with a hands-on exercise
- Experience working in Oil & Gas industry and knowledge of upstream, midstream, and downstream fundamental business drivers preferred, but not required
- Must be willing to periodically work long hours in office setting, and to be flexible to work evenings and weekends when required by business
- Must be willing to travel monthly to other Texas business locations, and occasional to travel domestically in support of business. Typically, <25% travel
- This is not a remote position and must be willing to go into the office on a daily basis

## **Physical Demands**

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. While performing the duties of this job, the employee is regularly required to talk or hear. The employee frequently is required to stand; walk; use hands to finger, handle or feel; and reach with hands and arms.

## **AAP/EEO Statement**

Pin Oak Group, LLC provides equal employment opportunity to all individuals regardless of their race, color, creed, religion, gender, age, sexual orientation, national origin, disability, veteran status, or any other characteristic protected by state, federal, or local law.

## **Other Duties**

Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities and activities may change at any time with or without notice.

## **Job Description Acknowledgement**

I have received, reviewed and fully understand the job description. I further understand that I am responsible for the satisfactory execution of the essential functions described therein, under any and all conditions as described.

Employee Name:

Employee Signature:

Date: