

Ehlers & Associates is adding a Financial Specialist/Municipal Advisor to Pewaukee, WI team!

Since 1955, Ehlers has designed financial solutions to help counties, municipalities, school districts and other local government units build better communities. We are experts in financing public sector projects including schools, civic buildings, water & sewer systems, parks, roadway construction and more.

Community leaders rely on us for our debt issuance, economic development & redevelopment, and financial planning services which promote financially sustainable communities and civic pride.

As a Financial Specialist, you will assist the Municipal Advisors in structuring and executing financing options for our clients in the area of bonds, economic development and long term financial planning. This position requires sound application of established standards and guidelines.

This position will be promoted to a Municipal Advisor once the employee has successfully passed the Municipal Advisor Representative Qualification Exam (Series 50) and has further demonstrated the knowledge and skills necessary to competently advise clients.

Once qualified as a Municipal Advisor, you will partner with clients and our internal team of experts to facilitate financial planning solutions for our clients.

The Financial Specialist will be responsible for the following:

- To support the Municipal Advisors in developing public finance solutions for cities, counties, villages, towns and other government bodies that address the needs of the client. Responsibilities include researching sources and types of financing, analyzing financial and economic data, preparing computer planning models and understanding the implications of applying alternatives.
- Assist the Municipal Advisors with structuring bond issues to meet the capital finance needs of clients. Includes learning statutory criteria governing the structuring and issuance of debt, developing a working knowledge of federal regulations affecting tax exempt and taxable municipal debt and understanding market and rating considerations for issuing bonds.
- Assist Municipal Advisors in overseeing the bond sale process. Includes reviewing official statements, ensuring necessary transcript procedures are accurate and deadlines met and providing Bond Sale team with bond closing details.
- Assist the Municipal Advisors in addressing economic development and redevelopment needs for communities. Includes learning rules for use of tax increment financing, and evaluating alternatives for risks.
- Assist the Municipal Advisors with preparing long term financial plans by gathering background data, analyzing financial information and preparing forecasts and tax rate projections.
- Attend client meetings with Ehlers staff and governing bodies.
- Some travel, including limited over-night travel is required.
- Responsible to attend on-going training/seminars as need to keep current and knowledgeable on all aspects of the job.
- Perform other duties as required to fulfill the mission of the company

**As a Municipal Advisor, you will be responsible for the following:**

- Develop public finance solutions for consideration by cities, counties, villages, towns and other government bodies that address the needs of the community. Responsibilities include researching sources and types of financing, analyzing financial and economic data, preparing computer planning models and understanding the implications of applying alternatives. Organize and present information in such a manner that it is understood by a variety of audiences.
- Structure bond issues to meet the capital finance needs of clients. This includes understanding statutory criteria governing the structuring and issuance of debt, federal regulations affecting tax-exempt and taxable municipal debt and market and rating considerations for issuing bonds.
- Address economic development and redevelopment needs for communities. Prepare and deliver presentations at seminars, conferences and other meetings.
- Market Ehlers services to clients and prospective clients. Develop and maintain positive relationships with clients, other professionals and public officials to identify possible opportunities for the company.
- Performs other duties as required to fulfill the mission of the company.

Knowledge, Skills and Abilities:

- Knowledge and exposure to the municipal bond industry is helpful.
- Analytical ability to understand how data relates to and affects other data and information.
- Ability to analyze technical data and develop creative solutions.
- Must be able to design and modify spreadsheets.
- Demonstrates well developed interpersonal skills that create and maintain positive relationships with clients and other professionals.
- Uses clear and concise written and oral communication skills to exchange information in person and on the phone. Displays mastery of business writing skills.
- Able to work and actively contribute in a team environment to achieve individual, team, and company goals.
- Must be able to recognize issues and work with team to effectively solve problems.
- Demonstrates exceptional attention to detail, care and accuracy in completing tasks.
- Able to proof and edit documents and communications so that they are grammatically correct and free of structural and organizational errors.
- Able to manage multiple work activities. Prioritizes tasks and organizes work so that deadlines are met and essential work is completed.
- Able to proactively ask questions of team and management and request guidance or assistance when needed. Provide assistance as needed.
- Able to work in a fast-paced deadline driven environment.
- Able to plan and achieve work requirements independently or with very general instructions.
- Able to travel as needed throughout WI.
- Seeks continuous opportunities to market Ehlers services.
- Recognizes and pursues opportunities for professional development.

Minimum Education and Experience:

Bachelor's Degree in Accounting, Finance, Public Administration or related field. Graduate degree and two (2) plus years of applicable work experience preferred.

Credentials, Licenses or Designations:

Passage of the Municipal Advisor Representative Examination (Series 50) is a position requirement.





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LEADERS IN PUBLIC FINANCE

To learn more about Ehlers & Associates visit our website at www.ehlers-inc.com or to apply for this position, please use the following link:

<https://www.paycomonline.net/v4/ats/index.php?/job/apply&clientkey=B4B0AC69A5654B0792285450201AFBDE&job=2015&jpt=>

Ehlers & Associates is an Equal Opportunity/Affirmative Action Employer

