



Hershey Trust Company Position Description

Position: Financial Analyst/Sr Financial Analyst
Date: January 4, 2024
Reports To: Director of Financial Reporting, Planning, and Analysis

The Hershey Trust Company (“HTC”) helps to advance the legacy and vision of Milton and Catherine Hershey in perpetuity through excellence in asset management and trust administration. HTC’s mission is to enable the Milton Hershey School Trust, The M.S. Hershey Foundation, and the Hershey Cemetery Perpetual Care Trust to achieve their long-term goals, by serving with excellence as their Trustee and asset manager. As a trusted and valued partner, we work collaboratively among the group of Hershey entities who collectively preserve and advance the Hershey legacy.

General Position Description and Principal Accountabilities:

The Financial Analyst, under the direction of the Director of Financial Reporting, Planning, and Analysis, prepares all financial reports and regulatory filings, budgets and forecasts, and financial analysis for the company and the respective trusts (the Milton Hershey School, M.S. Hershey Foundation, and Hershey Cemetery Trusts) in which we serve. The position will assist with the implementation, maintenance and review of internal controls and accounting policies and procedures.

- Responsible for preparing financial reports and regulatory filings, ensuring accuracy, completeness and compliance with applicable accounting standards, federal, state, and local regulations, while meeting all reporting deadlines.
- Responsible for preparing monthly, quarterly, and annual financial statements, including variance analysis and written explanation of variances.
- Responsible for SEC filings and call reporting to the Pennsylvania Department of Banking.
- Responsible for preparing and analyzing budget vs actual reports by department for monthly monitoring and review with departments.
- Assist with the preparation of budgets and reserve calculations.
- Coordinate with external tax return preparers for federal and state tax filings, actively participating in the management of state tax filings.
- Compile information requested by internal and external auditors and bank examiners.
- Prepare daily and periodic general ledger journal entries of operational and investment activity.
- Collaborate with accounting to manage and shorten the monthly, quarterly, and year-end close process, including utilizing system functionality and enhancements for continuous process improvement and efficiencies in preparation of closing entries, account reconciliations, and financial reports.



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- Contribute to the overall development of the accounting system, with a focus on optimizing current systems and processes while supporting new systems initiatives. Enhance the use of software integrations and applications to develop reporting capabilities and reconciliations between different systems to ensure data integrity and sound financial reporting.
- Collaborate with the Director of Financial Reporting, Planning, and Analysis to support overall department goals and objectives. Prepare various financial analyses and manage special projects as assigned by Director of Financial Reporting, Planning, and Analysis. Perform other related duties as assigned.
- Assist in creating a culture that is collaborative and nurturing a high-performance and customer service-oriented work environment aligned with our core values.

Minimum Qualifications:

All employees are expected to demonstrate our Core Values of **Teamwork, Integrity, Respect, Impact** through their words and their actions. In addition, this role requires a broad base of business knowledge and subject matter expertise, typically acquired through a combination of education, certification and prior work experience, as follows:

Education and Experience

- Bachelor's degree in Accounting/Finance required
- Obtained or Pursuing advanced Degree in Accounting/Finance or Certified Public Accountant (CPA) license preferred.
- 2+ years Financial Planning and Analysis experience preferred.
- Financial services industry experience and/or investment accounting experience preferred.
- Experience with Business Central, Yardi Voyager and/or Solver preferred.

Work Location

- This is a hybrid position with the expectation of being in the office in Hershey, PA two or more days per week (Tuesday, Wednesday, Thursday).

Knowledge, Abilities, and Skills:

- High ethical standards and solid understanding of accounting and finance principles, SEC and banking regulations, and federal, state, and local tax regulations
- Excellent verbal/written communication skills to convey complex topics to a variety of audiences.
- Team-oriented with strong interpersonal skills and ability to collaborate with others.
- Ability to prioritize timelines to ensure deadlines are met without sacrificing quality and accuracy.



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- Ability to multi-task and manage multiple priorities and deadlines in a fast-paced environment.
- Keen attention to detail with strong analytical and problem-solving skills
- Ability to manage change, quickly adapt to changing conditions, and take on other assignments.
- Excellent organization, prioritization, judgment, time management and project management skills. Supports and upholds a culture of excellence and precision.
- Capable and willing to do work at all levels, from directing work to performing day-to-day activities.

FLSA Classification: Exempt

HTC classification: Full-time

Hershey Trust Company is an equal opportunity employer. All aspects of employment including the decision to hire, promote, discipline, or discharge, will be based on merit, competence, performance, and business needs. We do not discriminate on the basis of race, color, religion, marital status, age, national origin, ancestry, physical or mental disability, medical condition, pregnancy, genetic information, gender, sexual orientation, gender identity or expression, veteran status, or any other status protected under federal, state, or local law.