

**Job Title:**

Senior Financial Analyst

**About Purple Brands**

We are a brand-led business, with an acclaimed portfolio of wine brands that include Raeburn Winery and Scattered Peaks, along with several burgeoning spirits brands led by Redwood Empire Whiskey. The Company is based in Petaluma California, with winery and distillery operations in the Russian River Valley, Sonoma County, and Napa Valley.

**Position Summary:**

Reporting to the FP&A Manager, the Senior Financial Analyst will partner closely with key the Company's Business Partners to provide insight and analysis to support great decision making. The position will be responsible for helping all functions at the Company to manage their P&L budget forecast and actuals and provide thoughtful analytics. This role will partner with Sales, Marketing, Production, and G&A leaders working closely with Accounting to identify key decisions early, make sure those decisions are informed by the right information and analysis, and drive action. Role will also support critical cash flow & balance sheet forecasting.

**Essential Duties:**

- Lead revenue forecasting and variance analysis process.
- Create and update driver based financial forecast models used to budget Revenue, COGS, OPEX, with updates of key assumptions and financial impact analysis.
- Create departmental OPEX & Production forecasts by understanding spend drivers, risks, and opportunities.
- Monitor throughout the month to land within targets, perform variance analysis, and determine root cause to address variances.
- Creation of monthly P&L Financial Statements, reporting and analysis.
- Build monthly financial forecast presentation for executive staff.
- Provide analysis of depletions, shipments, pricing, incentives, and promotions.
- Develop self-service tools using TARGIT business intelligence platform.
- Responsible for Capital Planning & Overhead model & analysis.
- Support forecast process for material Cash flow & Balance Sheet drivers such as inventory.
- Provide ad hoc analysis and reporting.

**Qualifications:**

- Bachelor's degree.
- 4-5 years of finance or related experience.
- Strong analytical skills and ability to analyze complex data and derive meaning/insight.
- Positive, proactive attitude.
- Action-oriented with ability to complete assignments in timely manner and manage priorities.
- Demonstrated ability to partner effectively cross functionally. Sales & Operations team experience preferred.
- Experience with manufactured goods industry preferred.
- Advanced Excel and PowerPoint skills.
- Experience with large ERP and financial planning systems (NAV preferred).
- Self-motivated.
- Strong organizational skills.
- Excellent verbal and written communication skills.
- Handles stressful situations and deadline pressures well.

- Wine and/or Spirits industry experience preferred.

**Physical Demands:**

|  |   |   |   |
|--|---|---|---|
| <b>Stand</b>                                   | F | <b>Lift/Carry</b>                             |   |
| <b>Walk</b>                                    | F | 10 lbs or Less                                | O |
| <b>Sit</b>                                     | F | 11 – 20 lbs                                   | O |
| <b>Handling/Grasping (repetitive motions)</b>  | O | 21 – 50 lbs                                   | O |
| <b>Reaching Above Shoulder</b>                 | O | 51 – 100 lbs                                  | R |
| <b>Reaching Outward</b>                        | O | Over 100 lbs                                  | N |
| <b>Climb</b>                                   | R | <b>Push/Pull</b>                              |   |
| <b>Crawl</b>                                   | R | 12 lbs or Less                                | O |
| <b>Squat or Kneel</b>                          | R | 13 – 25 lbs                                   | O |
| <b>Bend</b>                                    | R | 26 – 40 lbs                                   | O |
| <b>Working at the computer</b>                 | C | 41 – 100 lbs                                  | R |
| <b>Driving</b>                                 | R | <b>Near Vision</b> (closer than arm’s length) | C |
| <b>Respirator Use</b>                          | N | <b>Far Vision</b> (farther than arm’s length) | C |
| <b>Other Personal Protective Equipment Use</b> | O | <b>Color Vision</b>                           | C |

**Legend:**

|                           |  |
|---------------------------|--|
| <b>N</b> (Not Applicable) | Activity is not applicable to this occupation.                                 |
| <b>R</b> (Rarely)         | Occupation requires this activity several times a month (not daily)            |
| <b>O</b> (Occasionally)   | Occupation requires this activity up to 33% of the time (0-2.5hrs/day)         |
| <b>F</b> (Frequently)     | Occupation requires this activity from 33% - 66% of the time (2.5-5.5 hrs/day) |
| <b>C</b> (Constantly)     | Occupation requires this activity more than 66% of the time (5.5+ hrs/day)     |

The above information is representative of the work performed in this position, however it is not all-inclusive. The omission of a specific duty or responsibility does not exclude it from the position if the work is similar or related to the essential duties and responsibilities. Other tasks may be assigned as needed.

**Reasonable Accommodations Statement:**

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. Reasonable accommodations may be made to enable qualified individuals with disabilities to perform the essential functions.