

Financial Analyst or Associate



Company Description

The Yuba Group LLC is a municipal advisory firm which provides independent, objective analysis and advice to colleges, universities and other not-for-profit institutions. Yuba provides customized consulting and analytical services to our clients in financial and capital planning, management of capital markets activity, derivatives, and other financial products. Our team works to develop collaborative relationships for the benefit of our clients with various market participants including investment banks, commercial banks, investors, and rating agencies.

Job Description

While the ultimate title of the position will reflect the candidate's experience, this is a full-time position for an Analyst or Associate to assist the firm's senior professionals. We are seeking a highly motivated individual who enjoys working at a small firm and who has strong analytical and technical skills to focus on financial modeling and related analysis including:

- Interacting with colleagues and clients to analyze and present quantitative information, possible implications of various decisions, and recommended approaches;
- Preparing presentation materials and memoranda describing market conditions and opportunities, including various financing options with pros/cons/risks/opportunities;
- Creating and utilizing complex Excel models related to debt, swaps and financial ratios;
- Maintaining proprietary firm databases, including financial statement data entry and verification;
- Using database information to generate financial forecasts;
- Monitoring relevant capital market activity, both in the primary and secondary markets;
- Developing insightful and visually interesting graphs and tables that summarize information and data in a clear and organized manner;
- Researching and organizing financial and credit information;
- Assisting in the maintenance and development of our client-specific web portal which provides market data and financial information; and
- Reviewing other analyses and materials prepared by colleagues, clients and third parties for accuracy and consistency.

Desired Experience and Skills

Candidates should demonstrate some or all of the following skills and experience:

- Familiarity with financial modeling and quantitative analysis;
- Understanding of financial statements and ratios
- Well-developed Excel skills including modeling and graphing;
- Ability to learn quickly and become familiar with new financial software/tools, including DBC Finance (bond structuring software) and Bloomberg if not already familiar;
- Excellent organizational and communication skills;

- Ability to work well under pressure and meet deadlines;
- Interest in financial markets;
- Ability to work independently and thoughtfully, while also knowing when to seek guidance and ask questions;
- Strong work ethic, attention to detail and a genuine interest in working with higher education and/or health care and not-for-profit institutions;
- Ability to work well in an intimate, collaborative environment focused on client relationships; and
- Demonstrated ability to exercise good judgment and conduct oneself with professionalism.

Minimum Qualifications:

- BA or BS with extensive coursework in finance, economics and/or business required;
- Proficiency in MS Excel, MS PowerPoint and MS Word;
- Interest in the capital markets and fundamental financial concepts;
- Prior work experience, preferably in a related field; and
- Desire to work with higher education and not-for-profit institutions

Prior experience at a rating agency, investment bank, buy-side asset management firm or a connection with higher education, health care and/or the capital markets will be viewed favorably.

For additional information about The Yuba Group, please visit our website at www.yubagroup.com.

Please submit a cover letter and resume to recruiting@yubagroup.com. A transcript may also be requested. Applications without a cover letter will not be considered.

Job Function: Consulting, Financial Services

Posted: August 2025

Position Type: Full-time/Permanent; currently hybrid in office work schedule with three days in NYC midtown office

Travel Percentage: 0-2 days/month

Location: NYC or SF area

Salary Range: \$80,000 to \$95,000 base salary with annual discretionary bonus; potential for higher compensation depending on experience.