

Finance Lead – Credit & Analysis

PeopleSoft Job Code / Title:	8138 / Global Finance Lead
Department / Subdepartment:	Global Finance / Revenue & Financial Analysis
Organizational Relationship:	Reports to Level 5 or higher
FLSA Status:	Exempt
UCM Level:	Level 4
Last Updated:	June 25, 2026

Department / Subdepartment Overview

The Global Finance department provides comprehensive financial management and strategic support across our global operations. The department ensures the financial health and sustainability of the firm, enabling us to deliver exceptional legal services to our clients worldwide.

Role Overview

The Finance Lead – Credit & Analysis is responsible for providing insight and advice on origination and proliferation credit to the firm's partners to help them to accurately record and capture the financial impacts of their work on their Brown Books.

The lead develops and maintains a deep technical knowledge of extensive client research methods, the firm's Credit policy and processes, and the firm's financial metrics, striving to understand the holistic implications of credit applications on these metrics. The lead leverages this technical understanding to cultivate relationships with key stakeholders, while managing expectations to ensure consistently appropriate guidance on Credit for accurately reflected financial metrics.

The lead also plays a critical leadership role in shaping the interpersonal dynamic on the team, striving to foster an environment focused on camaraderie, trust, idea generation, and career development. The lead is expected to actively participate in the development of all analysts in the team, in partnership with department leadership.

Essential Duties and Key Responsibilities

"Essential duties" are those that an individual must be able to perform with or without reasonable accommodation.

1. Researches and analyzes client data using external market intelligence and search platforms and internal systems, as well as reviews internal lawyer information to advise partners on eligibility and how to apply for credits according to the firm's policies
2. Partners with Conflicts, New Business Intake, Billing and FIC teams to thoroughly understand and advise on the implications of Credit on their processes and financial reporting for partners
3. Analyses and interrogates data, including financials, to drive efficiency and process improvement within the team
4. Builds and maintains trusted advisor relationships with lawyers and business services professionals at all levels to support and advise on credit
5. Manages portfolio of offices to make sure all partner credit needs are met with a structured proactive approach to balance an otherwise fluctuating workload throughout the year
6. Represents Credit team in cross-functional meetings to provide updates or answer questions
7. Delivers training on Credit to lawyers and business services colleagues, creating and maintaining detailed documentation, including teaching materials such as training handbooks and reference guides for end-users on processes, procedures, and sources of information employed during the performance of all research and analytical tasks

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8. Ensures emails received through the team's shared email are handled in a timely professional manner, including prioritizing urgent requests and ensuring that older follow up items are handed appropriately for the whole team
9. Develops and coaches the Credit analysts, leading them in their professional development endeavors
10. Assists with any research, analytical, and process improvement projects needed by the department to drive efficiencies
11. Promotes effective work practices, works as a team member, and shows respect for co-workers

Knowledge, Skills & Abilities

- Well-developed and professional interpersonal skills, including excellent written and verbal communication; ability to interact with people at all organizational levels
- Ability to take initiative and work both independently and in a team environment with a customer-service focus
- Advanced organizational skills to manage time well, prioritize effectively, and handle multiple deadlines
- Advanced attention to detail and research, critical thinking, and analytical skills
- Ability to learn and apply new skills quickly and effectively
- Advanced ability to research, analyze, and develop financial information and recommendations
- Advanced proficiency in PC applications, including the Microsoft suite (PowerPoint, Word, and Excel), especially Excel
- Extensive knowledge and skill in utilizing databases; proficiency in standard database procedures, such as searching and generating reports; S&P Capital IQ, S&P Capital IQ Pro, Orbis and Lexis+, FactSet or similar
- Advanced proficiency in Thomson Reuters 3E
- Firm understanding of KPIs and metrics; ability to discuss and guide on potential impacts
- Ability to handle confidential and sensitive information with the appropriate discretion

Position Specifications*Typical Experience*

- Typical years of relevant experience: a minimum of six years' experience in related research and analysis areas
- Typical years of cumulative experience: a minimum of seven years

Education

- Bachelor's degree or equivalent in Finance, Accounting, Business Administration, Economics, Statistics required

Working Conditions and Physical Demands

- Frequently move (e.g., walk) around the office
- Spend extensive time using a computer, including use of a PC keyboard and mouse or similar data input devices
- Travel may be required
- All Latham & Watkins positions are in a typical indoor office environment

The statements contained in this position description are not necessarily all-inclusive; additional duties may be assigned, and requirements may vary from time to time, and from location to location.