

# Senior Analyst – Credit & Analysis

<b>PeopleSoft Job Code / Title:</b>	2116 / Senior Financial Analyst
<b>Department / Subdepartment:</b>	Financial Analysis
<b>Organizational Relationship:</b>	Reports to the Finance Manager – Credit & Analysis
<b>FLSA Status:</b>	Exempt
<b>UCM Level:</b>	N/A
<b>Last Updated:</b>	January 7, 2026

## General Summary:

The Senior Analyst is a member of the Credit & Analysis team that provides origination and proliferation credit support and advice to the firm's partners to help them to accurately record and capture the financial impacts of their work on their Brown Books. The Senior Analyst will research and analyze client data using external market intelligence and search platforms, and internal systems, as well as review internal lawyer information, to advise partners on eligibility and how to apply for credits according to the firm's policies. The Senior Analyst will also have the opportunity to work on research, analytical and process improvement projects that drive efficiencies.

## Essential Duties and Responsibilities

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

1. Builds and maintains trusted advisor relationships with attorneys and staff at all levels to support and advise on credit.
2. Conducts extensive new client research to identify related entities and relationships with firm lawyers by interrogating the data from internal systems and external search databases, as well as internet searches and other sources, where needed, in order to make a sound assessment of which parties to include.
3. Manages ah-hoc credit questions, report queries and general proliferation and origination credit requests according to firm's credit policies.
4. Prepares client and attorney lists for partner Parallel O credit submissions by investigating client financial history and lawyer statuses to determine and justify relevance.
5. Knowledgeable on partner Brown Book metrics and advises on credit KPIs.
6. Supports Client Credit Council parallel O submissions and approvals, ensuring applications are accurately completed and approvals are handled appropriately according to the credit setup required.
7. Supports Credit Manager with Lateral partner onboarding and follow up to ensure their portable clients are set up appropriately.
8. Supports Credit Manager to provide Credit training and coaching to Attorney Support Assistant population firmwide.
9. Represents Credit in meetings with other teams to provide updates or answer questions.
10. 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.
11. Develops deeper understanding of peripheral team processes that impact Credit to better collaborate and capture efficiencies, for example, Conflicts, New Business Intake, Billing, FIC, etc.
12. Works with Credit Manager to develop procedures, processes, and workflow to constantly increase efficiency in the Credit team.
13. Trains, coaches and mentors new team members and wider internal colleagues on Credit processes and policies.
14. Works with Credit Manager to update, develop and improve internal Credit team training materials and documentation.

15. Promote effective work practices, work as a team member, and show respect for co-workers.

## **Knowledge, Skills, and Abilities**

- Excellent communication and professional interpersonal skills; ability to collaborate, build relationships and manage expectations with people at all organizational levels of the firm
- Excellent research, critical thinking, judgement and analytical skills
- Extensive knowledge and skill in utilizing databases for client research; must be familiar with standard database procedures, such as searching and generating reports; S&P Capital IQ, S&P Capital IQ Pro, Orbis, Lexis+, FactSet or similar
- Ability to analyze and interpret data and financials to determine what is happening and make the appropriate recommendations
- Familiarity and understanding of KPIs and metrics; being able to discuss and guide on potential impacts
- Ability to maintain a portfolio of offices independently, but also able to be a successful team player for the Credit shared mailbox and other activities
- Knowledge and proficiency in MS Office, including Excel at an intermediate level or higher
- Knowledge of Thomson Reuters 3E a plus
- Experienced at training, coaching and mentoring others
- Excellent time management and prioritization skills; experience with handling seasonal fluctuations in demand to better manage workload throughout the year
- Ability to follow consistent procedures and display attention to detail in all work activities
- Ability to handle confidential and sensitive information with the appropriate discretion

## **Position Specifications**

### *Work Experience*

- Minimum of five (5) years related research and analytical experience desired, preferably in a professional services firm

### *Education*

- Bachelor's Degree or equivalent 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.