

TORQ Analysis of Treasurers and Controllers to Financial Analysts

ANALYSIS INPUT					
Transfer	Title	O*NET	Filters		
From Title:	Treasurers and Controllers	11-3031.01	Abilities:	Importance Level: 50	Weight: 1
To Title:	Financial Analysts	13-2051.00	Skills:	Importance Level: 69	Weight: 1
Labor Market Area:	Maine Statewide		Knowledge:	Importance Level: 69	Weight: 1

TORQ RESULTS											
Grand TORQ:					95						
Ability TORQ		Skills TORQ		Knowledge TORQ							
Level		Level		Level							
	99		93		92						
Gaps To Narrow if Possible			Upgrade These Skills			Knowledge to Add					
Ability	Level	Gap	Impt	Skill	Level	Gap	Impt	Knowledge	Level	Gap	Impt
Flexibility of Closure	48	6	50	Systems Analysis	55	16	85	Geography	11	4	74
Deductive Reasoning	62	2	72	Learning Strategies	66	12	73				
Near Vision	59	2	65	Operations Analysis	58	12	69				
Selective Attention	42	1	50	Active Listening	85	8	92				
LEVEL and IMPT (IMPORTANCE) refer to the Target Financial Analysts. GAP refers to level difference between Treasurers and Controllers and Financial Analysts.											

ASK ANALYSIS			
Ability Level Comparison - Abilities with importance scores over 50			
Description	Treasurers and Controllers	Financial Analysts	Importance
Written Comprehension	62 	62 	78 
Oral Comprehension	60 	59 	75 
Oral Expression	62 	60 	75 
Written Expression	59 	59 	75 
Deductive Reasoning	60 	62 	72 
Inductive Reasoning	55 	51 	68 
Near Vision	57 	59 	65 

Speech Clarity	51	46	65
Problem Sensitivity	64	55	62
Number Facility	60	55	62
Speech Recognition	53	46	62
Mathematical Reasoning	59	53	59
Fluency of Ideas	46	46	53
Information Ordering	51	51	53
Category Flexibility	48	48	53
Flexibility of Closure	42	48	50
Selective Attention	41	42	50

Skill Level Comparison - Abilities with importance scores over 69

Description	Treasurers and Controllers	Financial Analysts	Importance
Active Listening	77	85	92
Systems Analysis	39	55	85
Learning Strategies	54	66	73
Operations Analysis	46	58	69

Knowledge Level Comparison - Knowledge with importance scores over 69

Description	Treasurers and Controllers	Financial Analysts	Importance
Geography	7	11	74

Experience & Education Comparison

Related Work Experience Comparison			Required Education Level Comparison		
Description	Treasurers and Controllers	Financial Analysts	Description	Treasurers and Controllers	Financial Analysts
10+ years	54%	16%	Doctoral	0%	0%
8-10 years	10%	1%	Professional Degree	0%	0%
6-8 years	6%	15%	Post-Masters Cert	4%	0%
4-6 years	15%	13%	Master's Degree	55%	15%
2-4 years	8%	38%	Post-Bachelor Cert	0%	0%
1-2 years	3%	1%	Bachelors	28%	84%
6-12 months	1%	1%	AA or Equiv	3%	0%
3-6 months	0%	0%	Some College	6%	0%
1-3 months	0%	0%	Post-Secondary Certificate	0%	0%
0-1 month	0%	0%	High School Diploma or GED	0%	0%
None	0%	11%	No HSD or GED	0%	0%

Treasurers and Controllers

Financial Analysts

Most Common Educational/Training Requirement:

Bachelor's or higher degree, plus work experience

Bachelor's degree

Job Zone Comparison

5 - Job Zone Five: Extensive Preparation Needed

4 - Job Zone Four: Considerable Preparation Needed



Extensive skill, knowledge, and experience are needed for these occupations. Many require more than five years of experience. For example, surgeons must complete four years of college and an additional five to seven years of specialized medical training to be able to do their job.	A minimum of two to four years of work-related skill, knowledge, or experience is needed for these occupations. For example, an accountant must complete four years of college and work for several years in accounting to be considered qualified.
A bachelor's degree is the minimum formal education required for these occupations. However, many also require graduate school. For example, they may require a master's degree, and some require a Ph.D., M.D., or J.D. (law degree).	Most of these occupations require a four - year bachelor's degree, but some do not.
Employees may need some on-the-job training, but most of these occupations assume that the person will already have the required skills, knowledge, work-related experience, and/or training.	Employees in these occupations usually need several years of work-related experience, on-the-job training, and/or vocational training.

Tasks

Treasurers and Controllers	Financial Analysts
Core Tasks	Core Tasks
<p>Generalized Work Activities:</p> <ul style="list-style-type: none"> • Getting Information - Observing, receiving, and otherwise obtaining information from all relevant sources. • Selling or Influencing Others - Convincing others to buy merchandise/goods or to otherwise change their minds or actions. • Interacting With Computers - Using computers and computer systems (including hardware and software) to program, write software, set up functions, enter data, or process information. • Establishing and Maintaining Interpersonal Relationships - Developing constructive and cooperative working relationships with others, and maintaining them over time. • Performing for or Working Directly with the Public - Performing for people or dealing directly with the public. This includes serving customers in restaurants and stores, and receiving clients or guests. 	<p>Generalized Work Activities:</p> <ul style="list-style-type: none"> • Analyzing Data or Information - Identifying the underlying principles, reasons, or facts of information by breaking down information or data into separate parts. • Getting Information - Observing, receiving, and otherwise obtaining information from all relevant sources. • Interacting With Computers - Using computers and computer systems (including hardware and software) to program, write software, set up functions, enter data, or process information. • Processing Information - Compiling, coding, categorizing, calculating, tabulating, auditing, or verifying information or data. • Communicating with Supervisors, Peers, or Subordinates - Providing information to supervisors, co-workers, and subordinates by telephone, in written form, e-mail, or in person.
Specific Tasks	Specific Tasks
<p>Occupation Specific Tasks:</p> <ul style="list-style-type: none"> • Analyze and classify risks and investments to determine their potential impacts on companies. • Approve or reject, or coordinate the approval and rejection of, lines of credit and commercial, real estate, and personal loans. • Communicate with stockholders and other investors to provide information, and to raise capital. • Develop and analyze information to assess the current and future financial status of firms. • Direct insurance negotiations, select insurance brokers and carriers, and place insurance. • Establish and maintain relationships with individual and business customers, and provide assistance with problems these 	<p>Occupation Specific Tasks:</p> <ul style="list-style-type: none"> • Analyze financial information to produce forecasts of business, industry, and economic conditions for use in making investment decisions. • Assemble spreadsheets and draw charts and graphs used to illustrate technical reports, using computer. • Collaborate with investment bankers to attract new corporate clients to securities firms. • Contact brokers and purchase investments for companies, according to company policy. • Determine the prices at which securities should be syndicated and offered to the public. • Evaluate and compare the relative quality of various securities in a given industry. • Interpret data affecting investment



customers may encounter.

- Establish procedures for custody and control of assets, records, loan collateral, and securities, in order to ensure safekeeping.
- Evaluate data pertaining to costs in order to plan budgets.
- Evaluate financial reporting systems, accounting and collection procedures, and investment activities, and make recommendations for changes to procedures, operating systems, budgets, and other financial control functions.
- Examine, evaluate, and process loan applications.
- Network within communities to find and attract new business.
- Oversee the flow of cash and financial instruments.
- Plan, direct, and coordinate risk and insurance programs of establishments to control risks and losses.
- Plan, direct, and coordinate the activities of workers in branches, offices, or departments of such establishments as branch banks, brokerage firms, risk and insurance departments, or credit departments.
- Prepare financial and regulatory reports required by laws, regulations, and boards of directors.
- Prepare operational and risk reports for management analysis.
- Recruit staff members, and oversee training programs.
- Review collection reports to determine the status of collections and the amounts of outstanding balances.
- Review reports of securities transactions and price lists in order to analyze market conditions.
- Submit delinquent accounts to attorneys or outside agencies for collection.

Detailed Tasks

Detailed Work Activities:

- analyze financial data
- analyze market conditions
- analyze operational or management reports or records
- approve or deny credit applications
- approve or deny loans
- assign work to staff or employees
- compile data for financial reports
- conduct financial investigations
- conduct or attend staff meetings
- develop budgets
- develop management control systems
- develop policies, procedures, methods, or standards
- direct and coordinate financial activities

programs, such as price, yield, stability, future trends in investment risks, and economic influences.

- Maintain knowledge and stay abreast of developments in the fields of industrial technology, business, finance, and economic theory.
- Monitor fundamental economic, industrial, and corporate developments through the analysis of information obtained from financial publications and services, investment banking firms, government agencies, trade publications, company sources, and personal interviews.
- Prepare plans of action for investment based on financial analyses.
- Present oral and written reports on general economic trends, individual corporations, and entire industries.
- Recommend investments and investment timing to companies, investment firm staff, or the investing public.

Detailed Tasks

Detailed Work Activities:

- advise clients on financial matters
- analyze financial data
- analyze financial information to project future revenues or expense
- analyze market conditions
- analyze scientific research data or investigative findings
- analyze social or economic data
- compile data for financial reports
- compute financial data
- conduct financial investigations
- create mathematical or statistical diagrams or charts
- evaluate degree of financial risk
- follow tax laws or regulations
- gather relevant financial data
- identify financial risks to company
- interpret charts or tables for social or economic research
- make presentations on financial matters
- perform general financial analysis
- prepare financial reports
- use computers to enter, access and retrieve financial data
- use knowledge of economic trends
- use spreadsheet software
- use statistical cost estimation methods

Technology - Examples

Analytical or scientific software

- Analyse-it Software



- identify financial risks to company
- monitor credit extension decisions
- oversee execution of organizational or program policies
- prepare reports for management
- prepare required government reports
- review loan applications
- use government regulations
- use negotiation techniques

Technology - Examples

Accounting software

- Accounting software
- Automatic Data Processing EasyPay software
- Hyperion Enterprise
- Intuit QuickBooks
- Job costing software
- MYOB Premier Accounting Small Business Suite
- Sage Fixed Asset Solution FAS
- Sage MP Fund Accounting
- Sage Peachtree

Data base user interface and query software

- Database software
- Microsoft Access
- Oracle software
- Structured query language SQL

Electronic mail software

- Microsoft Outlook

Enterprise resource planning ERP software

- ADERANT Expert Back Office, Powered by Keystone
- Deltek software
- Enterprise resource planning ERP software
- Exact Software Macola ES
- Great Plains Dynamics software
- Hyperion Solutions System 9 Planning
- Microsoft Great Plains
- Oracle JD Edwards OneWorld

- Decisioneering Crystal Ball

- Genetic algorithm software

- Keypoint DataDesk

- Mathematical software

- Palisade Evolver

- Palisade StatTools

- Pattern recognition software

- SAS JMP

- The Mathworks MATLAB

- Ward Systems Group GeneHunter

- Ward Systems Group NeuralShell Predictor

- Wolfram Research Mathematica

Charting software

- Data visualization software
- Montgomery Investment Technology Utility XL
- TickQuest NeoTicker

Data base management system software

- Oracle software

Data base user interface and query software

- IBM Lotus Approach
- Microsoft Access

Enterprise resource planning ERP software

- SSA Global Infinium Financial Management

Expert system software

- Ivorix Neurostrategy Finance
- Matheny Pattern Forecaster Plus
- Neural network modeling software
- NeuroSolutions for MatLab

Financial analysis software

- Advanced Portfolio Technologies Report Builder
- Advanced Portfolio Technologies Simulator
- AnalyzerXL software
- Annuities analysis software
- Aspen Graphics software



- Oracle PeopleSoft

- SAP software

- Solomon Software

Financial analysis software

- FRx software

- Hyperion Pillar software

- Oracle Financials

Human resources software

- Automatic Data Processing PC payroll for windows PCPW

Office suite software

- Microsoft Office

Presentation software

- Microsoft PowerPoint

Spreadsheet software

- Corel QuattroPro

- IBM Lotus 1-2-3

- Microsoft Excel

Word processing software

- Microsoft Word

Tools - Examples

- 10-key calculators

- Desktop computers

- Notebook computers

- Personal computers

- Personal digital assistants PDA

- Tablet computers

- BizBench Benchmarking Software

- BizPricer Business Valuation Software

- Business Forecast Systems Forecast Pro

- DealMaven Comparable Company Valuation Analysis

- DealMaven M&A Accretion/Dilution One-Pager

- DealMaven Modeling ToolPack for Excel

- Derivatives Imagine Trading System

- Derivicom FinOptions XL

- Economic forecasting software

- Experian Credinomics

- Express Business Valuations

- Financial modeling software

- FinEng Solutions PerfoRM

- FinEng Solutions Quantis

- Fractal pattern analysis software

- Genetic algorithm optimization software

- Harland Financial Solutions DecisionPro

- I-flex Solutions Reveleus Investment Performance Measurement

- Innova Financial Solutions Derivatives Expert

- Leading Market Technologies EXPO

- Longview Consolidation

- Longview Solutions Khalix

- Market forecast software

- MergerStat Control Premiums

- MergerStat Price to Earnings Ratios

- Mid-Market Comps software

- MoneySoft Corporate Valuation

- Monte carlo simulation software

- Montgomery Investment Technology Bonds XL

- Montgomery Investment Technology Exotics XL

- Montgomery Investment Technology FinTools



- Montgomery Investment Technology Options XL
- Montgomery Investment Technology QuoteTools
- Montgomery Investment Technology Risk XL
- Montgomery Investment Technology SigTools
- Moss Adams Profit Mentor
- Mutual fund analysis software
- NeuroSolutions Trading Solutions
- OptionVue Options Analysis
- Palisade Bond @nalyst
- Peer-to-Peer Financial Analysis
- Pi Blue OptWorks Excel
- Portfolio management software
- Pricing software
- Quantifying marketability discount QMD modeling software
- RiskMetrics Group WealthBench
- Securities analysis software
- Spreadware Business Financial Analysis
- Spreadware Business Valuator
- Spreadware Pro Forma
- Steele Mutual Fund and Variable Annuity Expert
- SunGard BancWare
- SunGard Kiodex Risk Workbench
- TechHackers Convertible Bond @nalyst
- TechHackers Credit @nalyst
- TechHackers Exotic @nalyst
- TechHackers Financial @nalyst
- TechHackers IRO @nalyst
- TechHackers MBS @nalyst
- TechHackers Swap @nalyst
- Tetrahex Fractal Finance
- Tips Standard Securities Calculation Bond Analytics Module



- Tips Standard Securities Calculation Mortgage-Backed Analytics Module
- Trendsetter Software ProAnalyst
- Unlimited Learning Resources Valusource Pro
- ValuSource BIZCOMPS
- Whitebirch Software Projected Financials
- Wolfram Research Derivatives
- Wolfram Research Mathematica Finance Essentials
- Wolfram Research Mathematica UnRisk Pricing Engine

Information retrieval or search software

- dailyVest Investment Personalization Platform
- TradeTools Financial Market Databases
- TradeTools Monthly U.S. Economic Database
- Ward Systems Group NeuroShell Trader

Presentation software

- DealMaven PresLink for PowerPoint and Word
- Microsoft PowerPoint

Spreadsheet software

- Apple AppleWorks
- Corel QuattroPro
- IBM Lotus 1-2-3
- Microsoft Excel
- Spreadsheet software

Word processing software

- Microsoft Word
- Report generation software

Tools - Examples

- 10-key calculators
- Desktop computers
- Notebook computers
- Personal computers
- Personal digital assistants PDA
- Tablet computers

**Labor Market Comparison**

Maine Department of Labor.

Description	Treasurers and Controllers	Financial Analysts	Difference
Median Wage	\$ 67,670	\$ 71,380	\$ 3,710
10th Percentile Wage	\$ 41,820	\$ 42,650	\$ 830
25th Percentile Wage	N/A	N/A	N/A
75th Percentile Wage	\$ 89,670	\$ 86,220	\$(3,450)
90th Percentile Wage	\$119,660	\$107,560	\$(12,100)
Mean Wage	\$ 74,780	\$ 73,130	\$(1,650)
Total Employment - 2016	2,440	210	-2,230
Employment Base - 2006	2,692	243	-2,449
Projected Employment - 2025	2,881	268	-2,613
Projected Job Growth - 2006-2025	7.0 %	10.3 %	3.3 %
Projected Annual Openings - 2006-2025	58	4	-54
Special			

Special
Occupations:★ Maine High Wage - In
Demand**National Job Posting Trends**

Trend for Treasurers and Controllers and Financial Analysts

Data from [Indeed](http://Indeed.com)



Programs

Related Programs

Accounting and Business/Management

Accounting and Business/Management. An integrated or combined program in accounting and business administration/management that prepares individuals to function as accountants and business managers.

No information on schools for the program

Accounting and Finance

Accounting and Finance. An integrated or combined program in accounting and finance that prepares individuals to function as accountants and financial managers or analysts.

Institution	Address	City	URL
University of Southern Maine	96 Falmouth St	Portland	www.usm.maine.edu

Finance, General

Finance, General. A program that generally prepares individuals to plan, manage, and analyze the financial and monetary aspects and performance of business enterprises, banking institutions, or other organizations. Includes instruction in principles of accounting; financial instruments; capital planning; funds acquisition; asset and debt management; budgeting; financial analysis; and investments and portfolio management.

Institution	Address	City	URL
Husson College	One College Circle	Bangor	www.husson.edu
Saint Josephs College	278 Whites Bridge Rd	Standish	www.sjcme.edu
Thomas College	180 W River Rd	Waterville	www.thomas.edu

Financial Planning

Financial Planning and Services. A program that prepares individuals to plan and manage the financial interests and growth of individuals and institutions. Includes instruction in portfolio management, investment management, estate planning, insurance, tax planning, strategic investing and planning, financial consulting services, and client relations.

Institution	Address	City	URL
University of Maine at Augusta	46 University Dr	Augusta	www.uma.maine.edu/
University of Maine at Augusta	46 University Dr	Augusta	www.uma.maine.edu/

International Finance

International Finance. A program that prepares individuals to manage international financial operations and related currency transactions. Includes instruction in international banking, international monetary and financial policy, money and capital markets, foreign exchange, risk analysis, and international cash flow operations.

No information on schools for the program

Investments and Securities



Investments and Securities. A program that prepares individuals to manage assets placed in capital markets, and related technical operations. Includes instruction in security analysis, debt and equity analysis, investment strategies, securities markets, computer-assisted research, portfolio management, portfolio performance analysis, and applications to specific investment problems and business situations.

No information on schools for the program

Maine Statewide Promotion Opportunities for Treasurers and Controllers

O*NET Code	Title	Grand TORQ	Job Zone	Employment	Median Wage	Difference	Growth	Annual Job Openings	Special
11-3031.01	Treasurers and Controllers	100	5	2,440	\$67,670.00	\$0.00	7%	58	
13-2051.00	Financial Analysts	95	4	210	\$71,380.00	\$3,710.00	10%	4	
11-3041.00	Compensation and Benefits Managers	92	3	200	\$68,560.00	\$890.00	2%	5	
13-2052.00	Personal Financial Advisors	91	3	360	\$94,100.00	\$26,430.00	10%	13	
11-3031.02	Financial Managers, Branch or Department	89	4	2,440	\$67,670.00	\$0.00	7%	58	
11-2031.00	Public Relations Managers	87	4	290	\$71,020.00	\$3,350.00	9%	10	
23-1011.00	Lawyers	85	5	1,910	\$80,120.00	\$12,450.00	6%	73	★
25-1063.00	Economics Teachers, Postsecondary	85	5	80	\$73,830.00	\$6,160.00	11%	2	
11-1021.00	General and Operations Managers	83	4	8,490	\$77,050.00	\$9,380.00	-5%	209	
11-1011.00	Chief Executives	82	5	750	\$102,290.00	\$34,620.00	-6%	25	
11-2021.00	Marketing Managers	81	4	570	\$74,560.00	\$6,890.00	7%	17	
11-2022.00	Sales Managers	80	4	1,310	\$72,720.00	\$5,050.00	3%	32	
11-3061.00	Purchasing Managers	80	4	330	\$72,560.00	\$4,890.00	2%	11	★
23-1023.00	Judges, Magistrate Judges, and Magistrates	79	5	80	\$115,160.00	\$47,490.00	1%	2	★



11-3021.00	Computer and Information Systems Managers	78	5	870	\$83,130.00	\$15,460.00	8%	21	
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Special Occupations: ★ Maine High Wage - In Demand

Maine Statewide Promotion Opportunities for Financial Analysts

O*NET Code	Title	Grand TORQ	Job Zone	Employment	Median Wage	Difference	Growth	Annual Job Openings	Special
13-2051.00	Financial Analysts	100	4	210	\$71,380.00	\$0.00	10%	4	
13-2052.00	Personal Financial Advisors	92	3	360	\$94,100.00	\$22,720.00	10%	13	
25-1063.00	Economics Teachers, Postsecondary	86	5	80	\$73,830.00	\$2,450.00	11%	2	
23-1011.00	Lawyers	84	5	1,910	\$80,120.00	\$8,740.00	6%	73	★
11-2022.00	Sales Managers	80	4	1,310	\$72,720.00	\$1,340.00	3%	32	
11-2021.00	Marketing Managers	79	4	570	\$74,560.00	\$3,180.00	7%	17	
11-3021.00	Computer and Information Systems Managers	79	5	870	\$83,130.00	\$11,750.00	8%	21	
11-1021.00	General and Operations Managers	78	4	8,490	\$77,050.00	\$5,670.00	-5%	209	
23-1023.00	Judges, Magistrate Judges, and Magistrates	78	5	80	\$115,160.00	\$43,780.00	1%	2	★
11-1011.00	Chief Executives	77	5	750	\$102,290.00	\$30,910.00	-6%	25	
11-3061.00	Purchasing Managers	76	4	330	\$72,560.00	\$1,180.00	2%	11	★
29-1051.00	Pharmacists	75	5	1,190	\$112,550.00	\$41,170.00	22%	46	★
11-9121.00	Natural Sciences Managers	74	5	180	\$79,810.00	\$8,430.00	8%	5	
25-1061.00	Anthropology and Archeology Teachers, Postsecondary	72	5	50	\$74,360.00	\$2,980.00	8%	1	



25-1051.00	Atmospheric, Earth, Marine, and Space Sciences Teachers, Postsecondary	71	5	100	\$77,390.00	\$6,010.00	11%	3
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Special Occupations: ★ Maine High Wage - In Demand

Top Industries for Financial Analysts

Industry	NAICS	% of Industry	Employment	Projected Employment	% Change
Other financial investment activities	523900	12.23%	26,970	43,500	61.29%
Management of companies and enterprises	551100	10.11%	22,307	28,287	26.81%
Securities and commodity contracts, brokerages, and exchanges	5231-2	9.55%	21,064	37,617	78.59%
Self-employed workers, primary job	000601	7.82%	17,254	22,058	27.84%
Depository credit intermediation	522100	7.68%	16,950	19,010	12.15%
Accounting, tax preparation, bookkeeping, and payroll services	541200	3.87%	8,546	11,149	30.46%
Management, scientific, and technical consulting services	541600	3.32%	7,315	14,366	96.38%
Computer systems design and related services	541500	2.05%	4,532	6,731	48.52%
Direct insurance (except life, health, and medical) carriers	524120	1.99%	4,386	5,043	14.98%
Other nondepository credit intermediation, including real estate credit and consumer lending	522290	1.77%	3,914	4,225	7.93%
General medical and surgical hospitals, public and private	622100	1.53%	3,376	4,112	21.78%
Colleges, universities, and professional schools, public and private	611300	1.44%	3,184	3,918	23.06%
Computer and peripheral equipment manufacturing	334100	1.29%	2,837	2,043	-28.00%
State government, excluding education and hospitals	929200	1.25%	2,755	2,974	7.94%
Other investment pools and funds	525900	1.20%	2,638	4,074	54.45%

Top Industries for Treasurers and Controllers

Industry	NAICS	% of Industry	Employment	Projected Employment	% Change
Depository credit intermediation	522100	14.40%	72,902	74,327	1.95%
Management of companies and enterprises	551100	7.98%	40,411	46,586	15.28%



Securities and commodity contracts, brokerages, and exchanges	5231-2	4.05%	20,507	30,461	48.54%
Self-employed workers, primary job	000601	3.88%	19,649	20,934	6.54%
Local government, excluding education and hospitals	939300	3.51%	17,785	19,980	12.34%
Accounting, tax preparation, bookkeeping, and payroll services	541200	3.27%	16,571	19,653	18.60%
Other nondepository credit intermediation, including real estate credit and consumer lending	522290	2.84%	14,398	17,266	19.92%
Other financial investment activities	523900	2.56%	12,983	18,297	40.93%
Federal government, excluding postal service	919999	2.41%	12,222	11,554	-5.47%
Colleges, universities, and professional schools, public and private	611300	1.72%	8,734	9,771	11.87%
General medical and surgical hospitals, public and private	622100	1.68%	8,503	9,414	10.71%
Automobile dealers	441100	1.61%	8,167	9,265	13.44%
Direct insurance (except life, health, and medical) carriers	524120	1.58%	8,009	8,371	4.52%
State government, excluding education and hospitals	929200	1.57%	7,953	7,804	-1.87%
Computer systems design and related services	541500	1.40%	7,071	9,548	35.02%



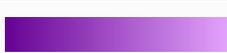
TORQ Analysis of Treasurers and Controllers to Compensation and Benefits Managers

ANALYSIS INPUT					
Transfer	Title	O* NET	Filters		
From Title:	Treasurers and Controllers	11-3031.01	Abilities:	Importance Level: 50	Weight: 1
To Title:	Compensation and Benefits Managers	11-3041.00	Skills:	Importance Level: 69	Weight: 1
Labor Market Area:	Maine Statewide		Knowledge:	Importance Level: 69	Weight: 1

TORQ RESULTS					
Grand TORQ:					92
Ability TORQ		Skills TORQ		Knowledge TORQ	
Level		Level		Level	
	97		93		87

Gaps To Narrow if Possible				Upgrade These Skills				Knowledge to Add			
Ability	Level	Gap	Impt	Skill	Level	Gap	Impt	Knowledge	Level	Gap	Impt
Speech Clarity	60	9	72	Social Perceptiveness	70	15	69	Clerical	67	18	85
Category Flexibility	55	7	59	Learning Strategies	68	14	69	Communications and Media	33	14	72
Speech Recognition	59	6	68	Speaking	69	2	82	Customer and Personal Service	63	8	74
Originality	51	5	50					Transportation	15	2	83
Near Vision	60	3	62								
Oral Comprehension	62	2	72								
Deductive Reasoning	62	2	68								
Information Ordering	53	2	68								
Written Expression	60	1	68								
Selective Attention	42	1	59								

LEVEL and IMPT (IMPORTANCE) refer to the Target Compensation and Benefits Managers. GAP refers to level difference between Treasurers and Controllers and Compensation and Benefits Managers.

ASK ANALYSIS			
Ability Level Comparison - Abilities with importance scores over 50			
Description	Treasurers and Controllers	Compensation and Benefits Managers	Importance
Written Comprehension	62 	62 	75 



Problem Sensitivity	64	59	75
Oral Comprehension	60	62	72
Oral Expression	62	62	72
Speech Clarity	51	60	72
Written Expression	59	60	68
Deductive Reasoning	60	62	68
Information Ordering	51	53	68
Speech Recognition	53	59	68
Inductive Reasoning	55	53	65
Near Vision	57	60	62
Category Flexibility	48	55	59
Selective Attention	41	42	59
Mathematical Reasoning	59	51	56
Originality	46	51	50
Number Facility	60	51	50

Skill Level Comparison - Abilities with importance scores over 69

Description	Treasurers and Controllers	Compensation and Benefits Managers	Importance
Speaking	67	69	82
Learning Strategies	54	68	69
Social Perceptiveness	55	70	69

Knowledge Level Comparison - Knowledge with importance scores over 69

Description	Treasurers and Controllers	Compensation and Benefits Managers	Importance
Clerical	49	67	85
Transportation	13	15	83
Customer and Personal Service	55	63	74
Communications and Media	19	33	72

Experience & Education Comparison

Related Work Experience Comparison			Required Education Level Comparison		
Description	Treasurers and Controllers	Compensation and Benefits Managers	Description	Treasurers and Controllers	Compensation and Benefits Managers
10+ years	54%	7%	Doctoral	0%	0%
8-10 years	10%	14%	Professional Degree	0%	0%
6-8 years	6%	15%	Post-Masters Cert	4%	13%
4-6 years	15%	19%	Master's Degree	55%	5%
2-4 years	8%	34%	Post-Bachelor Cert	0%	0%
1-2 years	3%	5%	Bachelors	28%	29%
6-12 months	1%	0%	AA or Equiv	3%	44%



months						
3-6 months	0%	0%		Some College	6%	7%
1-3 months	0%	0%		Post-Secondary Certificate	0%	0%
0-1 month	0%	0%		High School Diploma or GED	0%	0%
None	0%	3%		No HSD or GED	0%	0%

Treasurers and Controllers	Compensation and Benefits Managers
Most Common Educational/Training Requirement:	
Bachelor's or higher degree, plus work experience	Bachelor's or higher degree, plus work experience
Job Zone Comparison	
5 - Job Zone Five: Extensive Preparation Needed	3 - Job Zone Three: Medium Preparation Needed
Extensive skill, knowledge, and experience are needed for these occupations. Many require more than five years of experience. For example, surgeons must complete four years of college and an additional five to seven years of specialized medical training to be able to do their job.	Previous work-related skill, knowledge, or experience is required for these occupations. For example, an electrician must have completed three or four years of apprenticeship or several years of vocational training, and often must have passed a licensing exam, in order to perform the job.
A bachelor's degree is the minimum formal education required for these occupations. However, many also require graduate school. For example, they may require a master's degree, and some require a Ph.D., M.D., or J.D. (law degree).	Most occupations in this zone require training in vocational schools, related on-the-job experience, or an associate's degree. Some may require a bachelor's degree.
Employees may need some on-the-job training, but most of these occupations assume that the person will already have the required skills, knowledge, work-related experience, and/or training.	Employees in these occupations usually need one or two years of training involving both on-the-job experience and informal training with experienced workers.

Tasks	
Treasurers and Controllers	Compensation and Benefits Managers
Core Tasks	Core Tasks
<p>Generalized Work Activities:</p> <ul style="list-style-type: none"> • Getting Information - Observing, receiving, and otherwise obtaining information from all relevant sources. • Selling or Influencing Others - Convincing others to buy merchandise/goods or to otherwise change their minds or actions. • Interacting With Computers - Using computers and computer systems (including hardware and software) to program, write software, set up functions, enter data, or process information. • Establishing and Maintaining Interpersonal Relationships - Developing constructive and cooperative working relationships with others, and maintaining them over time. • Performing for or Working Directly with the Public - Performing for people or dealing directly with the public. This includes serving customers in restaurants and stores, and receiving clients or guests. 	<p>Generalized Work Activities:</p> <ul style="list-style-type: none"> • Communicating with Supervisors, Peers, or Subordinates - Providing information to supervisors, co-workers, and subordinates by telephone, in written form, e-mail, or in person. • Processing Information - Compiling, coding, categorizing, calculating, tabulating, auditing, or verifying information or data. • Interacting With Computers - Using computers and computer systems (including hardware and software) to program, write software, set up functions, enter data, or process information. • Getting Information - Observing, receiving, and otherwise obtaining information from all relevant sources. • Making Decisions and Solving Problems - Analyzing information and evaluating results to choose the best solution and solve problems.
Specific Tasks	Specific Tasks
<p>Occupation Specific Tasks:</p> <ul style="list-style-type: none"> • Analyze and classify risks and investments to determine their potential impacts on companies. • Approve or reject, or coordinate the approval and rejection of, lines of credit and 	<p>Occupation Specific Tasks:</p> <ul style="list-style-type: none"> • Administer, direct, and review employee benefit programs, including the integration of benefit programs following mergers and acquisitions. • Advise management on such matters as



- commercial, real estate, and personal loans.
- Communicate with stockholders and other investors to provide information, and to raise capital.
- Develop and analyze information to assess the current and future financial status of firms.
- Direct insurance negotiations, select insurance brokers and carriers, and place insurance.
- Establish and maintain relationships with individual and business customers, and provide assistance with problems these customers may encounter.
- Establish procedures for custody and control of assets, records, loan collateral, and securities, in order to ensure safekeeping.
- Evaluate data pertaining to costs in order to plan budgets.
- Evaluate financial reporting systems, accounting and collection procedures, and investment activities, and make recommendations for changes to procedures, operating systems, budgets, and other financial control functions.
- Examine, evaluate, and process loan applications.
- Network within communities to find and attract new business.
- Oversee the flow of cash and financial instruments.
- Plan, direct, and coordinate risk and insurance programs of establishments to control risks and losses.
- Plan, direct, and coordinate the activities of workers in branches, offices, or departments of such establishments as branch banks, brokerage firms, risk and insurance departments, or credit departments.
- Prepare financial and regulatory reports required by laws, regulations, and boards of directors.
- Prepare operational and risk reports for management analysis.
- Recruit staff members, and oversee training programs.
- Review collection reports to determine the status of collections and the amounts of outstanding balances.
- Review reports of securities transactions and price lists in order to analyze market conditions.
- Submit delinquent accounts to attorneys or outside agencies for collection.

Detailed Tasks

Detailed Work Activities:

- analyze financial data
- analyze market conditions
- analyze operational or management reports or records
- approve or deny credit applications

equal employment opportunity, sexual harassment and discrimination.

- Analyze compensation policies, government regulations, and prevailing wage rates to develop competitive compensation plan.
- Analyze statistical data and reports to identify and determine causes of personnel problems and develop recommendations for improvement of organization's personnel policies and practices.
- Conduct exit interviews to identify reasons for employee termination.
- Contract with vendors to provide employee services, such as food services, transportation, or relocation service.
- Design, evaluate and modify benefits policies to ensure that programs are current, competitive and in compliance with legal requirements.
- Develop methods to improve employment policies, processes, and practices, and recommend changes to management.
- Direct preparation and distribution of written and verbal information to inform employees of benefits, compensation, and personnel policies.
- Formulate policies, procedures and programs for recruitment, testing, placement, classification, orientation, benefits and compensation, and labor and industrial relations.
- Fulfill all reporting requirements of all relevant government rules and regulations, including the Employee Retirement Income Security Act (ERISA).
- Identify and implement benefits to increase the quality of life for employees, by working with brokers and researching benefits issues.
- Investigate and report on industrial accidents for insurance carriers.
- Maintain records and compile statistical reports concerning personnel-related data such as hires, transfers, performance appraisals, and absenteeism rates.
- Manage the design and development of tools to assist employees in benefits selection, and to guide managers through compensation decisions.
- Mediate between benefits providers and employees, such as by assisting in handling employees' benefits-related questions or taking suggestions.
- Negotiate bargaining agreements.
- Plan and conduct new employee orientations to foster positive attitude toward organizational objectives.
- Plan, direct, supervise, and coordinate work activities of subordinates and staff relating to employment, compensation, labor relations, and employee relations.
- Prepare budgets for personnel operations.
- Prepare detailed job descriptions and classification systems and define job levels and families, in partnership with other



- approve or deny credit applications
- approve or deny loans
- assign work to staff or employees
- compile data for financial reports
- conduct financial investigations
- conduct or attend staff meetings
- develop budgets
- develop management control systems
- develop policies, procedures, methods, or standards
- direct and coordinate financial activities
- identify financial risks to company
- monitor credit extension decisions
- oversee execution of organizational or program policies
- prepare reports for management
- prepare required government reports
- review loan applications
- use government regulations
- use negotiation techniques

Technology - Examples

Accounting software

- Accounting software
- Automatic Data Processing EasyPay software
- Hyperion Enterprise
- Intuit QuickBooks
- Job costing software
- MYOB Premier Accounting Small Business Suite
- Sage Fixed Asset Solution FAS
- Sage MP Fund Accounting
- Sage Peachtree

Data base user interface and query software

- Database software
- Microsoft Access
- Oracle software
- Structured query language SQL

Electronic mail software

- Microsoft Outlook

Enterprise resource planning ERP software

- ADERANT Expert Back Office, Powered by Keystone
- Deltek software

managers.

- Prepare personnel forecasts to project employment needs.
- Represent organization at personnel-related hearings and investigations.
- Resolve labor disputes and grievances.
- Study legislation, arbitration decisions, and collective bargaining contracts to assess industry trends.

Detailed Tasks

Detailed Work Activities:

- advise department managers in personnel matters
- advise management or labor union officials on labor relation issues
- analyze budgets
- analyze data to identify personnel problems
- answer customer or public inquiries
- assign work to staff or employees
- categorize occupational, educational, or employment information
- compile information on findings from investigation of accidents
- compile numerical or statistical data
- conduct or attend staff meetings
- conduct research on work-related topics
- confer with other departmental heads to coordinate activities
- develop budgets
- develop policies, procedures, methods, or standards
- develop records management system
- develop wage systems for workers
- direct and coordinate activities of workers or staff
- direct and coordinate human resource programs
- evaluate personnel benefits policies
- execute employee bargaining agreements
- fill out insurance forms
- forecast departmental personnel requirements
- implement employee bargaining agreements
- implement employee benefit plans
- implement employee compensation plans
- maintain awareness of social trends
- manage contracts
- monitor operational budget
- negotiate labor agreements
- obtain information from individuals
- orient new employees
- oversee execution of organizational or program policies
- prepare reports for management



- Enterprise resource planning ERP software
- Exact Software Macola ES
- Great Plains Dynamics software
- Hyperion Solutions System 9 Planning
- Microsoft Great Plains
- Oracle JD Edwards OneWorld
- Oracle PeopleSoft
- SAP software
- Solomon Software

Financial analysis software

- FRx software
- Hyperion Pillar software
- Oracle Financials

Human resources software

- Automatic Data Processing PC payroll for windows PCPW

Office suite software

- Microsoft Office

Presentation software

- Microsoft PowerPoint

Spreadsheet software

- Corel QuattroPro
- IBM Lotus 1-2-3
- Microsoft Excel

Word processing software

- Microsoft Word

Tools - Examples

- 10-key calculators
- Desktop computers
- Notebook computers
- Personal computers
- Personal digital assistants PDA
- Tablet computers

prepare reports for management

- present information on human resource management issues
- recommend improvements to work methods or procedures
- resolve personnel problems or grievances
- resolve worker or management conflicts
- use conflict resolution techniques
- use government regulations
- use interviewing procedures
- use knowledge of employee classification system
- write employee orientation or training materials

Technology - Examples

Accounting software

- Deltek Costpoint

Analytical or scientific software

- Business analysis software
- Media Professional software

- Mediamix software

- Relex Weibull

Charting software

- Microsoft Office Visio

Data base reporting software

- AdRelevance software

Data base user interface and query software

- Microsoft Access

Data mining software

- ClarityBlue software

Desktop publishing software

- Adobe Systems Adobe PageMaker
- Quark software

Document management software

- Atlas Business Solutions Staff Files
- Document management software

Electronic mail software

- IBM Lotus Notes
- Microsoft Outlook

Enterprise resource planning ERP software

- Enterprise resource planning ERP software
- Great Plains software



- Oracle E-Business Suite

- Oracle JD Edwards EnterpriseOne

- Oracle PeopleSoft

- SAP software

Graphics or photo imaging software

- Adobe Systems Adobe Illustrator

- Adobe Systems Adobe Photoshop software

Human resources software

- !Trak-it Solutions !Trak-it HR

- ADP Employease

- ADP HR/Benefits Solution

- Apex Business Software iHR

- Ascentis HR

- ASL HR Director

- Auxillium West HRnetSource

- Blue Chip Computer Consultants HumaNET

- Consultants in Data Processing HRnet

- Datamatics V-Core HR

- DenoSys HRiStragegy

- FSC Business Solutions Department Managers' Toolkit

- Genesys PeopleComeFirst

- Global Groupware Solutions Limited Smiles ERM On-Demand

- HarrisData Human Resources Information System HRIS

- HR-ease

- HRMS Solutions iVantage

- hSenid Business Solutions HRM Enterprise

- Human resource information system HRIS software

- Humanic Design Human Resources Management System HRMS

- iEmployee

- Jenss & Associates CompKeeper

- Lawson Human Resource Management



- Mangrove Software HR20
- NOW Solutions emPath
- Nuview Systems Cort HCM
- NuView Systems NuViewHR
- OrangeHRM
- PDS Vista HRMS
- People-Trak HR Essentials
- PerfectSoftware PerfectHR
- Piney Creek Digital Protocol System
- PSTek software
- Quadkey HR Server
- Sage Software Abra HRMS
- Saigun Technologies EmpXtrack
- Sentient Online MarketPrice
- Trigon Road Forte Leave Management
- UCN inContact Workforce Management Software WFM
- Ultimate Software UltiPro
- Vantage Point Software HRA
- Internet browser software
 - Web browser software
- Office suite software
 - Microsoft Office
- Presentation software
 - Microsoft PowerPoint
- Project management software
 - Atlas OnePoint software
 - Brainworks software
 - ComponentScience WebPlanner
 - FlowMaster software
 - Marketing Pilot software
 - Microsoft Project
 - PaloAlto Advertising Plan Pro
 - Rain Catcher Inspire



- Unisys Advertising Manager

Spreadsheet software

- Microsoft Excel

Video creation and editing software

- Apple iMvie

Web page creation and editing software

- Adobe Systems Adobe Dreamweaver

- Adobe Systems Adobe Flash Player

Word processing software

- Microsoft Word

Tools - Examples

- Desktop computers

- Universal serial bus USB flash drives

- Liquid crystal display LCD video projectors

- Laptop computers

- Personal computers

- Personal digital assistants PDA

- Optical disk drives

- Scanners

- Tablet computers

Labor Market Comparison

Maine Department of Labor.

Description	Treasurers and Controllers	Compensation and Benefits Managers	Difference
Median Wage	\$ 67,670	\$ 68,560	\$ 890
10th Percentile Wage	\$ 41,820	\$ 46,170	\$ 4,350
25th Percentile Wage	N/A	N/A	N/A
75th Percentile Wage	\$ 89,670	\$ 84,930	\$(4,740)
90th Percentile Wage	\$119,660	\$112,350	\$(7,310)
Mean Wage	\$ 74,780	\$ 72,940	\$(1,840)
Total Employment - 2016	2,440	200	-2,240
Employment Base - 2006	2,692	228	-2,464
Projected Employment - 2025	2,881	233	-2,648



Projected Job Growth - 2006-2025	7.0 %	2.2 %	-4.8 %
Projected Annual Openings - 2006-2025	58	5	-53
Special			
Special Occupations:	★ Maine High Wage - In Demand		

National Job Posting Trends

Trend for Treasurers and Controllers and Compensation and Benefits Managers



Data from [Indeed](http://Indeed.com)

Programs

No information on programs or the occupation.

Maine Statewide Promotion Opportunities for Treasurers and Controllers

O*NET Code	Title	Grand TORQ	Job Zone	Employment	Median Wage	Difference	Growth	Annual Job Openings	Special
11-3031.01	Treasurers and Controllers	100	5	2,440	\$67,670.00	\$0.00	7%	58	
13-2051.00	Financial Analysts	95	4	210	\$71,380.00	\$3,710.00	10%	4	
11-3041.00	Compensation and Benefits Managers	92	3	200	\$68,560.00	\$890.00	2%	5	



13-2052.00	Personal Financial Advisors	91	3	360	\$94,100.00	\$26,430.00	10%	13	
11-3031.02	Financial Managers, Branch or Department	89	4	2,440	\$67,670.00	\$0.00	7%	58	
11-2031.00	Public Relations Managers	87	4	290	\$71,020.00	\$3,350.00	9%	10	
23-1011.00	Lawyers	85	5	1,910	\$80,120.00	\$12,450.00	6%	73	★
25-1063.00	Economics Teachers, Postsecondary	85	5	80	\$73,830.00	\$6,160.00	11%	2	
11-1021.00	General and Operations Managers	83	4	8,490	\$77,050.00	\$9,380.00	-5%	209	
11-1011.00	Chief Executives	82	5	750	\$102,290.00	\$34,620.00	-6%	25	
11-2021.00	Marketing Managers	81	4	570	\$74,560.00	\$6,890.00	7%	17	
11-3061.00	Purchasing Managers	80	4	330	\$72,560.00	\$4,890.00	2%	11	★
11-2022.00	Sales Managers	80	4	1,310	\$72,720.00	\$5,050.00	3%	32	
23-1023.00	Judges, Magistrate Judges, and Magistrates	79	5	80	\$115,160.00	\$47,490.00	1%	2	★
11-3021.00	Computer and Information Systems Managers	78	5	870	\$83,130.00	\$15,460.00	8%	21	

Special Occupations: ★ Maine High Wage - In Demand

Maine Statewide Promotion Opportunities for Compensation and Benefits Managers

O*NET Code	Title	Grand TORQ	Job Zone	Employment	Median Wage	Difference	Growth	Annual Job Openings	Special
11-3041.00	Compensation and Benefits Managers	100	3	200	\$68,560.00	\$0.00	2%	5	
13-2051.00	Financial Analysts	89	4	210	\$71,380.00	\$2,820.00	10%	4	
11-2031.00	Public Relations Managers	88	4	290	\$71,020.00	\$2,460.00	9%	10	
23-1011.00	Lawyers	87	5	1,910	\$80,120.00	\$11,560.00	6%	73	★



13-2052.00	Personal Financial Advisors	87	3	360	\$94,100.00	\$25,540.00	10%	13	
11-1021.00	General and Operations Managers	85	4	8,490	\$77,050.00	\$8,490.00	-5%	209	
23-1023.00	Judges, Magistrate Judges, and Magistrates	83	5	80	\$115,160.00	\$46,600.00	1%	2	★
25-1063.00	Economics Teachers, Postsecondary	83	5	80	\$73,830.00	\$5,270.00	11%	2	
11-2021.00	Marketing Managers	82	4	570	\$74,560.00	\$6,000.00	7%	17	
11-9111.00	Medical and Health Services Managers	82	5	1,570	\$70,250.00	\$1,690.00	15%	55	
11-1011.00	Chief Executives	81	5	750	\$102,290.00	\$33,730.00	-6%	25	
11-2022.00	Sales Managers	81	4	1,310	\$72,720.00	\$4,160.00	3%	32	
29-1051.00	Pharmacists	79	5	1,190	\$112,550.00	\$43,990.00	22%	46	★
11-3021.00	Computer and Information Systems Managers	78	5	870	\$83,130.00	\$14,570.00	8%	21	
11-3061.00	Purchasing Managers	78	4	330	\$72,560.00	\$4,000.00	2%	11	★

Special Occupations: ★ Maine High Wage - In Demand

Top Industries for Compensation and Benefits Managers

Industry	NAICS	% of Industry	Employment	Projected Employment	% Change
Management of companies and enterprises	551100	12.31%	6,041	6,964	15.28%
Local government, excluding education and hospitals	939300	4.98%	2,447	2,748	12.34%
Depository credit intermediation	522100	3.59%	1,763	1,797	1.95%
General medical and surgical hospitals, public and private	622100	2.81%	1,378	1,526	10.71%
Colleges, universities, and professional schools, public and private	611300	2.38%	1,168	1,307	11.87%
Computer systems design and related services	541500	1.93%	950	1,282	35.02%
Management, scientific, and technical consulting services	541600	1.78%	876	1,563	78.52%



Accounting, tax preparation, bookkeeping, and payroll services	541200	1.60%	783	929	18.60%
Research and development in the physical, engineering, and life sciences	541710	1.44%	707	755	6.69%
Self-employed workers, primary job	000601	1.40%	689	734	6.54%
Employment services	561300	1.37%	671	849	26.56%
Office administrative services	561100	1.30%	639	810	26.79%
State government, excluding education and hospitals	929200	1.13%	553	543	-1.87%
Legal services	541100	1.05%	514	564	9.84%
Offices of physicians	621100	1.03%	507	639	25.98%

Top Industries for Treasurers and Controllers

Industry	NAICS	% of Industry	Employment	Projected Employment	% Change
Depository credit intermediation	522100	14.40%	72,902	74,327	1.95%
Management of companies and enterprises	551100	7.98%	40,411	46,586	15.28%
Securities and commodity contracts, brokerages, and exchanges	5231-2	4.05%	20,507	30,461	48.54%
Self-employed workers, primary job	000601	3.88%	19,649	20,934	6.54%
Local government, excluding education and hospitals	939300	3.51%	17,785	19,980	12.34%
Accounting, tax preparation, bookkeeping, and payroll services	541200	3.27%	16,571	19,653	18.60%
Other nondepository credit intermediation, including real estate credit and consumer lending	522290	2.84%	14,398	17,266	19.92%
Other financial investment activities	523900	2.56%	12,983	18,297	40.93%
Federal government, excluding postal service	919999	2.41%	12,222	11,554	-5.47%
Colleges, universities, and professional schools, public and private	611300	1.72%	8,734	9,771	11.87%
General medical and surgical hospitals, public and private	622100	1.68%	8,503	9,414	10.71%
Automobile dealers	441100	1.61%	8,167	9,265	13.44%
Direct insurance (except life, health, and medical) carriers	524120	1.58%	8,009	8,371	4.52%
State government, excluding education and hospitals	929200	1.57%	7,953	7,804	-1.87%
Computer systems design and related services	541500	1.40%	7,071	9,548	35.02%



TORQ Analysis of Treasurers and Controllers to Personal Financial Advisors

ANALYSIS INPUT					
Transfer	Title	O*NET	Filters		
From Title:	Treasurers and Controllers	11-3031.01	Abilities:	Importance Level: 50	Weight: 1
To Title:	Personal Financial Advisors	13-2052.00	Skills:	Importance Level: 69	Weight: 1
Labor Market Area:	Maine Statewide		Knowledge:	Importance Level: 69	Weight: 1

TORQ RESULTS											
Grand TORQ:					91						
Ability TORQ		Skills TORQ		Knowledge TORQ							
Level	 98	Level	 93	Level	 83						
Gaps To Narrow if Possible				Upgrade These Skills				Knowledge to Add			
Ability	Level	Gap	Impt	Skill	Level	Gap	Impt	Knowledge	Level	Gap	Impt
Oral Expression	66	4	78	Service Orientation	66	21	77	Customer and Personal Service	66	14	79
Number Facility	64	4	68	Active Listening	95	18	84				
Deductive Reasoning	62	2	68	Speaking	80	13	78				
				Time Management	86	9	75				
				Persuasion	69	6	71				
				Critical Thinking	76	5	82				
				Mathematics	71	3	75				
				Active Learning	73	2	75				
LEVEL and IMPT (IMPORTANCE) refer to the Target Personal Financial Advisors. GAP refers to level difference between Treasurers and Controllers and Personal Financial Advisors.											

ASK ANALYSIS			
Ability Level Comparison - Abilities with importance scores over 50			
Description	Treasurers and Controllers	Personal Financial Advisors	Importance
Oral Comprehension	60 	60 	 78
Oral Expression	62 	66 	 78
Written Comprehension	62 	57 	 75



Written Expression	59	59	75
Problem Sensitivity	64	51	75
Inductive Reasoning	55	50	72
Speech Clarity	51	44	72
Deductive Reasoning	60	62	68
Number Facility	60	64	68
Speech Recognition	53	48	68
Mathematical Reasoning	59	48	62
Near Vision	57	51	62
Category Flexibility	48	42	59
Information Ordering	51	46	56
Fluency of Ideas	46	42	50
Originality	46	39	50
Selective Attention	41	39	50

Skill Level Comparison - Abilities with importance scores over 69

Description	Treasurers and Controllers	Personal Financial Advisors	Importance
Active Listening	77	95	84
Critical Thinking	71	76	82
Speaking	67	80	78
Service Orientation	45	66	77
Mathematics	68	71	75
Active Learning	71	73	75
Time Management	77	86	75
Persuasion	63	69	71

Knowledge Level Comparison - Knowledge with importance scores over 69

Description	Treasurers and Controllers	Personal Financial Advisors	Importance
Customer and Personal Service	52	66	79

Experience & Education Comparison

Related Work Experience Comparison			Required Education Level Comparison		
Description	Treasurers and Controllers	Personal Financial Advisors	Description	Treasurers and Controllers	Personal Financial Advisors
10+ years	54%	0%	Doctoral	0%	0%
8-10 years	10%	1%	Professional Degree	0%	1%



6-8 years	6%	3%	Post-Masters Cert	4%	0%
4-6 years	15%	12%	Master's Degree	55%	0%
2-4 years	8%	41%	Post-Bachelor Cert	0%	9%
1-2 years	3%	5%	Bachelors	28%	44%
6-12 months	1%	0%	AA or Equiv	3%	17%
3-6 months	0%	0%	Some College	6%	10%
1-3 months	0%	0%	Post-Secondary Certificate	0%	0%
0-1 month	0%	0%	High School Diploma or GED	0%	15%
None	0%	35%	No HSD or GED	0%	0%

Treasurers and Controllers		Personal Financial Advisors	
Most Common Educational/Training Requirement:			
Bachelor's or higher degree, plus work experience		Bachelor's degree	
Job Zone Comparison			
5 - Job Zone Five: Extensive Preparation Needed		3 - Job Zone Three: Medium Preparation Needed	
<p>Extensive skill, knowledge, and experience are needed for these occupations. Many require more than five years of experience. For example, surgeons must complete four years of college and an additional five to seven years of specialized medical training to be able to do their job.</p> <p>A bachelor's degree is the minimum formal education required for these occupations. However, many also require graduate school. For example, they may require a master's degree, and some require a Ph.D., M.D., or J.D. (law degree).</p> <p>Employees may need some on-the-job training, but most of these occupations assume that the person will already have the required skills, knowledge, work-related experience, and/or training.</p>		<p>Previous work-related skill, knowledge, or experience is required for these occupations. For example, an electrician must have completed three or four years of apprenticeship or several years of vocational training, and often must have passed a licensing exam, in order to perform the job.</p> <p>Most occupations in this zone require training in vocational schools, related on-the-job experience, or an associate's degree. Some may require a bachelor's degree.</p> <p>Employees in these occupations usually need one or two years of training involving both on-the-job experience and informal training with experienced workers.</p>	

Tasks

Treasurers and Controllers	Personal Financial Advisors
<p style="text-align: center; background-color: #eee; margin: 0;">Core Tasks</p> <p>Generalized Work Activities:</p> <ul style="list-style-type: none"> Getting Information - Observing, receiving, and otherwise obtaining information from all relevant sources. Selling or Influencing Others - Convincing others to buy merchandise/goods or to otherwise change their minds or actions. Interacting With Computers - Using computers and computer systems (including hardware and software) to program, write software, set up functions, enter data, or process information. Establishing and Maintaining Interpersonal Relationships - Developing constructive and cooperative working relationships with others, and maintaining them over time. Performing for or Working Directly with the Public - Performing for people or dealing directly with the public. This includes serving customers in restaurants and stores, and receiving clients or guests. 	<p style="text-align: center; background-color: #eee; margin: 0;">Core Tasks</p> <p>Generalized Work Activities:</p> <ul style="list-style-type: none"> Communicating with Persons Outside Organization - Communicating with people outside the organization, representing the organization to customers, the public, government, and other external sources. This information can be exchanged in person, in writing, or by telephone or e-mail. Analyzing Data or Information - Identifying the underlying principles, reasons, or facts of information by breaking down information or data into separate parts. Getting Information - Observing, receiving, and otherwise obtaining information from all relevant sources. Processing Information - Compiling, coding, categorizing, calculating, tabulating, auditing, or verifying information or data. Documenting/Recording Information - Entering, transcribing, recording, storing, or maintaining information in written or electronic/magnetic form. Provide Consultation and Advice to Others -
<p style="text-align: center; background-color: #eee; margin: 0;">Specific Tasks</p>	



Occupation Specific Tasks:

- Analyze and classify risks and investments to determine their potential impacts on companies.
- Approve or reject, or coordinate the approval and rejection of, lines of credit and commercial, real estate, and personal loans.
- Communicate with stockholders and other investors to provide information, and to raise capital.
- Develop and analyze information to assess the current and future financial status of firms.
- Direct insurance negotiations, select insurance brokers and carriers, and place insurance.
- Establish and maintain relationships with individual and business customers, and provide assistance with problems these customers may encounter.
- Establish procedures for custody and control of assets, records, loan collateral, and securities, in order to ensure safekeeping.
- Evaluate data pertaining to costs in order to plan budgets.
- Evaluate financial reporting systems, accounting and collection procedures, and investment activities, and make recommendations for changes to procedures, operating systems, budgets, and other financial control functions.
- Examine, evaluate, and process loan applications.
- Network within communities to find and attract new business.
- Oversee the flow of cash and financial instruments.
- Plan, direct, and coordinate risk and insurance programs of establishments to control risks and losses.
- Plan, direct, and coordinate the activities of workers in branches, offices, or departments of such establishments as branch banks, brokerage firms, risk and insurance departments, or credit departments.
- Prepare financial and regulatory reports required by laws, regulations, and boards of directors.
- Prepare operational and risk reports for management analysis.
- Recruit staff members, and oversee training programs.
- Review collection reports to determine the status of collections and the amounts of outstanding balances.
- Review reports of securities transactions and price lists in order to analyze market conditions.
- Submit delinquent accounts to attorneys or outside agencies for collection.

Detailed Tasks

Providing guidance and expert advice to management or other groups on technical, systems-, or process-related topics.

Specific Tasks

Occupation Specific Tasks:

- Analyze financial information obtained from clients to determine strategies for meeting clients' financial objectives.
- Answer clients' questions about the purposes and details of financial plans and strategies.
- Authorize release of financial aid funds to students.
- Build and maintain client bases, keeping current client plans up-to-date and recruiting new clients on an ongoing basis.
- Collect information from students to determine their eligibility for specific financial aid programs.
- Conduct seminars and workshops on financial planning topics such as retirement planning, estate planning, and the evaluation of severance packages.
- Contact clients periodically to determine if there have been changes in their financial status.
- Contact clients' creditors to arrange for payment adjustments so that payments are feasible for clients and agreeable to creditors.
- Determine amounts of aid to be granted to students, considering such factors as funds available, extent of demand, and financial needs.
- Devise debt liquidation plans that include payoff priorities and timelines.
- Explain and document for clients the types of services that are to be provided, and the responsibilities to be taken by the personal financial advisor.
- Explain to individuals and groups the details of financial assistance available to college and university students, such as loans, grants, and scholarships.
- Guide clients in the gathering of information such as bank account records, income tax returns, life and disability insurance records, pension plan information, and wills.
- Implement financial planning recommendations, or refer clients to someone who can assist them with plan implementation.
- Interview clients to determine their current income, expenses, insurance coverage, tax status, financial objectives, risk tolerance, and other information needed to develop a financial plan.
- Meet with clients' other advisors, including attorneys, accountants, trust officers, and investment bankers, to fully understand clients' financial goals and circumstances.
- Monitor financial market trends to ensure that plans are effective, and to identify any



Detailed Work Activities:

- analyze financial data
- analyze market conditions
- analyze operational or management reports or records
- approve or deny credit applications
- approve or deny loans
- assign work to staff or employees
- compile data for financial reports
- conduct financial investigations
- conduct or attend staff meetings
- develop budgets
- develop management control systems
- develop policies, procedures, methods, or standards
- direct and coordinate financial activities
- identify financial risks to company
- monitor credit extension decisions
- oversee execution of organizational or program policies
- prepare reports for management
- prepare required government reports
- review loan applications
- use government regulations
- use negotiation techniques

Technology - Examples

Accounting software

- Accounting software
- Automatic Data Processing EasyPay software
- Hyperion Enterprise
- Intuit QuickBooks
- Job costing software
- MYOB Premier Accounting Small Business Suite
- Sage Fixed Asset Solution FAS
- Sage MP Fund Accounting

Data base user interface and query software

- Database software
- Microsoft Access
- Oracle software
- Structured query language SQL

Electronic mail software

- Microsoft Outlook

that plans are effective, and to identify any necessary updates.

- Open accounts for clients, and disburse funds from account to creditors as agents for clients.
- Participate in the selection of candidates for specific financial aid awards.
- Prepare and interpret for clients information such as investment performance reports, financial document summaries, and income projections.
- Recommend strategies clients can use to achieve their financial goals and objectives, including specific recommendations in such areas as cash management, insurance coverage, and investment planning.
- Research and investigate available investment opportunities to determine whether they fit into financial plans.
- Review clients' accounts and plans regularly to determine whether life changes, economic changes, or financial performance indicate a need for plan reassessment.
- Sell financial products such as stocks, bonds, mutual funds, and insurance if licensed to do so.

Detailed Tasks

Detailed Work Activities:

- account for or dispense funds
- advise clients on financial matters
- advise clients or customers
- analyze applicant's financial status
- analyze financial data
- approve or deny loans
- compare clients' applications with eligibility requirements
- compile data for financial reports
- compile information through interviews
- complete information on loan forms
- compute financial data
- compute payment schedule
- compute property equity
- compute taxes
- conduct financial investigations
- determine program eligibility
- explain what financial assistance is available
- gather relevant financial data
- interview customers
- maintain cooperative relationships with clients
- obtain financial information from individuals
- obtain information from individuals
- perform general financial analysis
- prepare financial reports
- prepare reports
- provide customer service



Enterprise resource planning ERP software

- ADERANT Expert Back Office, Powered by Keystone
- Deltek software
- Enterprise resource planning ERP software
- Exact Software Macola ES
- Great Plains Dynamics software
- Hyperion Solutions System 9 Planning
- Microsoft Great Plains
- Oracle JD Edwards OneWorld
- Oracle PeopleSoft
- SAP software
- Solomon Software

Financial analysis software

- FRx software
- Hyperion Pillar software
- Oracle Financials

Human resources software

- Automatic Data Processing PC payroll for windows PCPW

Office suite software

- Microsoft Office

Presentation software

- Microsoft PowerPoint

Spreadsheet software

- Corel QuattroPro
- IBM Lotus 1-2-3
- Microsoft Excel

Word processing software

- Microsoft Word

Tools - Examples

- 10-key calculators
- Desktop computers
- Notebook computers
- Personal computers
- Personal digital assistants PDA

- review loan applications
- select applicants meeting qualifications
- use computers to enter, access and retrieve financial data
- use interviewing procedures
- use negotiation techniques

Technology - Examples

Analytical or scientific software

- Monte Carlo software

Calendar and scheduling software

- Pimlico Software DateBk

Compliance software

- ComplianceMAX software

Customer relationship management CRM software

- ACT! ACT4Advisors
- CRM Software Junxure-i
- DataViz Beyond Contacts
- eMoneyAdvisor AdvisorPlatform
- EZ-Data Client Data System
- Financial Planning Consultants Practice Builder
- Getting Things Done GTD software
- IAS software
- Investigo software
- Microsoft Business Contact Manager
- ProTracker Advantage
- Redtail Technology Our Business Online

Web Information Solutions Pocket Informant

Data base user interface and query software

- Practice management software PMS

Document management software

- Cabinet NG CNG-SAFE
- Financeware Finance File Manager
- ScanSoft PaperPort Pro
- SunGard LockBox
- WORLDOX software

Financial analysis software

- Advent Axys



- Tablet computers

- AdviceAmerica AdvisorVision
- Advisory World ICE
- ASI Client Acquisition Solution
- Asset allocation software
- Brentmark Stock Option Risk Analyzer
- Cheshire Financial Planning Suite
- Cygnus IncomeMax
- Education planning software
- EISI NaviPlan
- Estate Capitol Needs Analysis
- Estate planning software
- ExpenseWatch software
- Finance Logix Education Planner
- Finance Logix Insurance Planner
- Finance Logix Retirement Planner
- Financeware AASim
- Financeware WealthSimulator
- Financial planning software
- Financial Profiles Profiles+ Professional
- Host Analytics Host Budget
- Ibbotson Analyst
- Ibbotson Portfolio Strategist
- Impact PlanLabX3
- IMPACT Wealth Distribution Analysis
- Inuit Quicken
- Investment and business valuation template software
- Investment Scorecard software
- Investment tracking software
- J&L Financial Planner
- MasterPlan software
- Microsoft Money



- MoneyTree Silver Financial Planner (financial analysis feature)

- Morningstar Principia

- Needs analysis software

- Net Worth Strategies Stock Opter Pro

- OmniPlanner software

- Optima IAS

- PIE Technologies MoneyGuidePro

- PlanPlus Pro

- PlanScan Portfolio Pathfinder

- Portfolio management software

- Retirement planning software

- Sawhney ExecPlan

- ScenarioNow RetireNow

- SunGard Frontier

- SunGard PlanningStation

- SunGard WebPlaid

- Tax planning software

- Thomson ONE Advisor

- Torrid Retirement Planner

- Unger Software Methusaleh

- WealthTec AllocationPro

- WealthTec Foundations

- WealthTec WealthMaster

Internet browser software

- Web browser software

Presentation software

- Financial planning presentation software

- Microsoft PowerPoint

- MoneyTree Silver Financial Planner (presentation feature)

Spreadsheet software

- Corel QuattroPro

- IBM Lotus 1-2-3



- Microsoft Excel

Word processing software

- Automatic Data Processing ProxyEdge

- Financial report generation software

- Microsoft Word

Tools - Examples

- 10-key calculators

- Desktop computers

- Notebook computers

- Personal computers

- Personal digital assistants PDA

- Tablet computers

Labor Market Comparison

Maine Department of Labor.

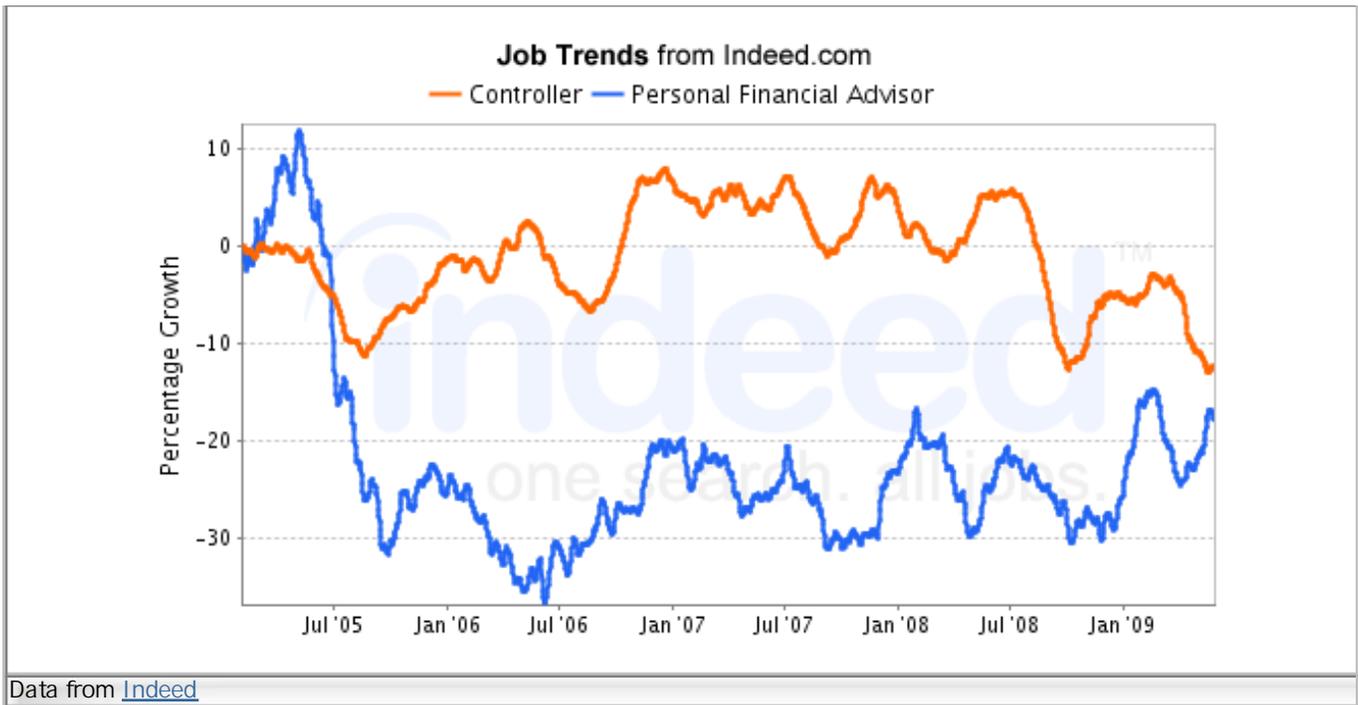
Description	Treasurers and Controllers	Personal Financial Advisors	Difference
Median Wage	\$ 67,670	\$ 94,100	\$ 26,430
10th Percentile Wage	\$ 41,820	\$ 40,120	\$(1,700)
25th Percentile Wage	N/A	N/A	N/A
75th Percentile Wage	\$ 89,670	N/A	N/A
90th Percentile Wage	\$119,660	N/A	N/A
Mean Wage	\$ 74,780	\$102,750	\$ 27,970
Total Employment - 2016	2,440	360	-2,080
Employment Base - 2006	2,692	711	-1,981
Projected Employment - 2025	2,881	783	-2,098
Projected Job Growth - 2006-2025	7.0 %	10.1 %	3.1 %
Projected Annual Openings - 2006-2025	58	13	-45
Special			

Special Occupations:

★ Maine High Wage - In Demand

National Job Posting Trends

Trend for Treasurers and Controllers and Personal Financial Advisors



Programs			
Related Programs			
Finance, General			
<p>Finance, General. A program that generally prepares individuals to plan, manage, and analyze the financial and monetary aspects and performance of business enterprises, banking institutions, or other organizations. Includes instruction in principles of accounting; financial instruments; capital planning; funds acquisition; asset and debt management; budgeting; financial analysis; and investments and portfolio management.</p>			
Institution	Address	City	URL
Husson College	One College Circle	Bangor	www.husson.edu
Saint Josephs College	278 Whites Bridge Rd	Standish	www.sjcme.edu
Thomas College	180 W River Rd	Waterville	www.thomas.edu
Financial Planning			
<p>Financial Planning and Services. A program that prepares individuals to plan and manage the financial interests and growth of individuals and institutions. Includes instruction in portfolio management, investment management, estate planning, insurance, tax planning, strategic investing and planning, financial consulting services, and client relations.</p>			
Institution	Address	City	URL
University of Maine at Augusta	46 University Dr	Augusta	www.uma.maine.edu/
University of Maine at Augusta	46 University Dr	Augusta	www.uma.maine.edu/
International Finance			



International Finance. A program that prepares individuals to manage international financial operations and related currency transactions. Includes instruction in international banking, international monetary and financial policy, money and capital markets, foreign exchange, risk analysis, and international cash flow operations.

No information on schools for the program

Maine Statewide Promotion Opportunities for Treasurers and Controllers

O* NET Code	Title	Grand TORQ	Job Zone	Employment	Median Wage	Difference	Growth	Annual Job Openings	Special
11-3031.01	Treasurers and Controllers	100	5	2,440	\$67,670.00	\$0.00	7%	58	
13-2051.00	Financial Analysts	95	4	210	\$71,380.00	\$3,710.00	10%	4	
11-3041.00	Compensation and Benefits Managers	92	3	200	\$68,560.00	\$890.00	2%	5	
13-2052.00	Personal Financial Advisors	91	3	360	\$94,100.00	\$26,430.00	10%	13	
11-3031.02	Financial Managers, Branch or Department	89	4	2,440	\$67,670.00	\$0.00	7%	58	
11-2031.00	Public Relations Managers	87	4	290	\$71,020.00	\$3,350.00	9%	10	
23-1011.00	Lawyers	85	5	1,910	\$80,120.00	\$12,450.00	6%	73	★
25-1063.00	Economics Teachers, Postsecondary	85	5	80	\$73,830.00	\$6,160.00	11%	2	
11-1021.00	General and Operations Managers	83	4	8,490	\$77,050.00	\$9,380.00	-5%	209	
11-1011.00	Chief Executives	82	5	750	\$102,290.00	\$34,620.00	-6%	25	
11-2021.00	Marketing Managers	81	4	570	\$74,560.00	\$6,890.00	7%	17	
11-2022.00	Sales Managers	80	4	1,310	\$72,720.00	\$5,050.00	3%	32	
11-3061.00	Purchasing Managers	80	4	330	\$72,560.00	\$4,890.00	2%	11	★
23-1023.00	Judges, Magistrate Judges, and Magistrates	79	5	80	\$115,160.00	\$47,490.00	1%	2	★
11-3021.00	Computer and Information Systems Managers	78	5	870	\$83,130.00	\$15,460.00	8%	21	



Special Occupations: ★ Maine High Wage - In Demand

Maine Statewide Promotion Opportunities for Personal Financial Advisors

O*NET Code	Title	Grand TORQ	Job Zone	Employment	Median Wage	Difference	Growth	Annual Job Openings	Special
13-2052.00	Personal Financial Advisors	100	3	360	\$94,100.00	\$0.00	10%	13	
29-1051.00	Pharmacists	77	5	1,190	\$112,550.00	\$18,450.00	22%	46	★
23-1023.00	Judges, Magistrate Judges, and Magistrates	76	5	80	\$115,160.00	\$21,060.00	1%	2	★
11-1011.00	Chief Executives	73	5	750	\$102,290.00	\$8,190.00	-6%	25	
29-1081.00	Podiatrists	68	5	40	\$101,210.00	\$7,110.00	5%	6	★
29-1062.00	Family and General Practitioners	67	5	710	\$138,550.00	\$44,450.00	7%	20	★
29-1041.00	Optometrists	66	5	90	\$107,740.00	\$13,640.00	19%	4	
29-1063.00	Internists, General	66	5	420	\$144,760.00	\$50,660.00	6%	12	★

Special Occupations: ★ Maine High Wage - In Demand

Top Industries for Personal Financial Advisors

Industry	NAICS	% of Industry	Employment	Projected Employment	% Change
Self-employed workers, primary job	000601	30.52%	53,789	57,305	6.54%
Other financial investment activities	523900	23.52%	41,444	74,078	78.74%
Securities and commodity contracts, brokerages, and exchanges	5231-2	17.20%	30,315	54,244	78.93%
Depository credit intermediation	522100	13.67%	24,092	29,476	22.34%
Insurance agencies and brokerages	524210	1.91%	3,365	3,806	13.11%
Other investment pools and funds	525900	1.35%	2,383	4,015	68.49%
Management of companies and enterprises	551100	1.30%	2,293	2,643	15.28%
Management, scientific, and technical consulting services	541600	1.12%	1,974	3,524	78.52%
Other insurance related activities	524290	1.05%	1,851	2,213	19.53%
Accounting, tax preparation, bookkeeping, and payroll services	541200	0.89%	1,565	1,856	18.60%



Activities related to credit intermediation	522300	0.73%	1,280	1,658	29.48%
Insurance and employee benefit funds	525100	0.56%	984	1,212	23.23%
State government, excluding education and hospitals	929200	0.44%	783	768	-1.87%
General medical and surgical hospitals, public and private	622100	0.43%	750	830	10.71%
Self-employed workers, secondary job	000602	0.37%	652	649	-0.45%

Top Industries for Treasurers and Controllers

Industry	NAICS	% of Industry	Employment	Projected Employment	% Change
Depository credit intermediation	522100	14.40%	72,902	74,327	1.95%
Management of companies and enterprises	551100	7.98%	40,411	46,586	15.28%
Securities and commodity contracts, brokerages, and exchanges	5231-2	4.05%	20,507	30,461	48.54%
Self-employed workers, primary job	000601	3.88%	19,649	20,934	6.54%
Local government, excluding education and hospitals	939300	3.51%	17,785	19,980	12.34%
Accounting, tax preparation, bookkeeping, and payroll services	541200	3.27%	16,571	19,653	18.60%
Other nondepository credit intermediation, including real estate credit and consumer lending	522290	2.84%	14,398	17,266	19.92%
Other financial investment activities	523900	2.56%	12,983	18,297	40.93%
Federal government, excluding postal service	919999	2.41%	12,222	11,554	-5.47%
Colleges, universities, and professional schools, public and private	611300	1.72%	8,734	9,771	11.87%
General medical and surgical hospitals, public and private	622100	1.68%	8,503	9,414	10.71%
Automobile dealers	441100	1.61%	8,167	9,265	13.44%
Direct insurance (except life, health, and medical) carriers	524120	1.58%	8,009	8,371	4.52%
State government, excluding education and hospitals	929200	1.57%	7,953	7,804	-1.87%
Computer systems design and related services	541500	1.40%	7,071	9,548	35.02%



TORQ Analysis of Treasurers and Controllers to Budget Analysts

ANALYSIS INPUT					
Transfer	Title	O*NET	Filters		
From Title:	Treasurers and Controllers	11-3031.01	Abilities:	Importance Level: 50	Weight: 1
To Title:	Budget Analysts	13-2031.00	Skills:	Importance Level: 69	Weight: 1
Labor Market Area:	Maine Statewide		Knowledge:	Importance Level: 69	Weight: 1

TORQ RESULTS											
Grand TORQ:					91						
Ability TORQ		Skills TORQ		Knowledge TORQ							
Level	98	Level	91	Level	83						
Gaps To Narrow if Possible				Upgrade These Skills				Knowledge to Add			
Ability	Level	Gap	Impt	Skill	Level	Gap	Impt	Knowledge	Level	Gap	Impt
Near Vision	64	7	62	Coordination	79	22	74	Computers and Electronics	64	16	69
Category Flexibility	51	3	62	Science	37	21	76				
				Speaking	82	15	82				
				Active Learning	77	10	73				
				Learning Strategies	65	3	73				
				Negotiation	58	3	69				
LEVEL and IMPT (IMPORTANCE) refer to the Target Budget Analysts. GAP refers to level difference between Treasurers and Controllers and Budget Analysts.											

ASK ANALYSIS			
Ability Level Comparison - Abilities with importance scores over 50			
Description	Treasurers and Controllers	Budget Analysts	Importance
Problem Sensitivity	64	53	78
Oral Comprehension	60	59	72
Written Comprehension	62	60	72
Oral Expression	62	59	68
Deductive Reasoning	60	60	68
Inductive Reasoning	55	55	68
Information Ordering	51	50	68
Mathematical Reasoning	59	48	65
Speech Recognition	53	53	65



Speech Clarity	51	48	65
Category Flexibility	48	51	62
Number Facility	60	51	62
Near Vision	57	64	62
Written Expression	59	53	56
Selective Attention	41	39	56
Fluency of Ideas	46	46	53
Perceptual Speed	37	37	53

Skill Level Comparison - Abilities with importance scores over 69

Description	Treasurers and Controllers	Budget Analysts	Importance
Speaking	67	82	82
Science	16	37	76
Coordination	57	79	74
Active Learning	67	77	73
Learning Strategies	62	65	73
Negotiation	55	58	69

Knowledge Level Comparison - Knowledge with importance scores over 69

Description	Treasurers and Controllers	Budget Analysts	Importance
Computers and Electronics	48	64	69

Experience & Education Comparison

Related Work Experience Comparison			Required Education Level Comparison		
Description	Treasurers and Controllers	Budget Analysts	Description	Treasurers and Controllers	Budget Analysts
10+ years	54%	0%	Doctoral	0%	0%
8-10 years	10%	0%	Professional Degree	0%	0%
6-8 years	6%	1%	Post-Masters Cert	4%	0%
4-6 years	15%	2%	Master's Degree	55%	6%
2-4 years	8%	32%	Post-Bachelor Cert	0%	0%
1-2 years	3%	44%	Bachelors	28%	90%
6-12 months	1%	16%	AA or Equiv	3%	1%
3-6 months	0%	0%	Some College	6%	1%
1-3 months	0%	0%	Post-Secondary Certificate	0%	0%
0-1 month	0%	0%	High School Diploma or GED	0%	0%
None	0%	1%	No HSD or GED	0%	0%

Treasurers and Controllers

Budget Analysts

Most Common Educational/Training Requirement:

Bachelor's or higher degree, plus work experience

Bachelor's degree



Job Zone Comparison

5 - Job Zone Five: Extensive Preparation Needed	4 - Job Zone Four: Considerable Preparation Needed
Extensive skill, knowledge, and experience are needed for these occupations. Many require more than five years of experience. For example, surgeons must complete four years of college and an additional five to seven years of specialized medical training to be able to do their job.	A minimum of two to four years of work-related skill, knowledge, or experience is needed for these occupations. For example, an accountant must complete four years of college and work for several years in accounting to be considered qualified.
A bachelor's degree is the minimum formal education required for these occupations. However, many also require graduate school. For example, they may require a master's degree, and some require a Ph.D., M.D., or J.D. (law degree).	Most of these occupations require a four - year bachelor's degree, but some do not.
Employees may need some on-the-job training, but most of these occupations assume that the person will already have the required skills, knowledge, work-related experience, and/or training.	Employees in these occupations usually need several years of work-related experience, on-the-job training, and/or vocational training.

Tasks

Treasurers and Controllers	Budget Analysts
Core Tasks	Core Tasks
Generalized Work Activities: <ul style="list-style-type: none"> • Getting Information - Observing, receiving, and otherwise obtaining information from all relevant sources. • Selling or Influencing Others - Convincing others to buy merchandise/goods or to otherwise change their minds or actions. • Interacting With Computers - Using computers and computer systems (including hardware and software) to program, write software, set up functions, enter data, or process information. • Establishing and Maintaining Interpersonal Relationships - Developing constructive and cooperative working relationships with others, and maintaining them over time. • Performing for or Working Directly with the Public - Performing for people or dealing directly with the public. This includes serving customers in restaurants and stores, and receiving clients or guests. 	Generalized Work Activities: <ul style="list-style-type: none"> • Analyzing Data or Information - Identifying the underlying principles, reasons, or facts of information by breaking down information or data into separate parts. • Interacting With Computers - Using computers and computer systems (including hardware and software) to program, write software, set up functions, enter data, or process information. • Monitoring and Controlling Resources - Monitoring and controlling resources and overseeing the spending of money. • Getting Information - Observing, receiving, and otherwise obtaining information from all relevant sources. • Communicating with Supervisors, Peers, or Subordinates - Providing information to supervisors, co-workers, and subordinates by telephone, in written form, e-mail, or in person.
Specific Tasks	Specific Tasks
Occupation Specific Tasks: <ul style="list-style-type: none"> • Analyze and classify risks and investments to determine their potential impacts on companies. • Approve or reject, or coordinate the approval and rejection of, lines of credit and commercial, real estate, and personal loans. • Communicate with stockholders and other investors to provide information, and to raise capital. • Develop and analyze information to assess the current and future financial status of firms. • Direct insurance negotiations, select insurance brokers and carriers, and place insurance. • Establish and maintain relationships with 	Occupation Specific Tasks: <ul style="list-style-type: none"> • Analyze monthly department budgeting and accounting reports to maintain expenditure controls. • Compile and analyze accounting records and other data to determine the financial resources required to implement a program. • Consult with managers to ensure that budget adjustments are made in accordance with program changes. • Direct the preparation of regular and special budget reports. • Examine budget estimates for completeness, accuracy, and conformance with procedures and regulations. • Interpret budget directives and establish policies for carrying out directives.



individual and business customers, and provide assistance with problems these customers may encounter.

- Establish procedures for custody and control of assets, records, loan collateral, and securities, in order to ensure safekeeping.
- Evaluate data pertaining to costs in order to plan budgets.
- Evaluate financial reporting systems, accounting and collection procedures, and investment activities, and make recommendations for changes to procedures, operating systems, budgets, and other financial control functions.
- Examine, evaluate, and process loan applications.
- Network within communities to find and attract new business.
- Oversee the flow of cash and financial instruments.
- Plan, direct, and coordinate risk and insurance programs of establishments to control risks and losses.
- Plan, direct, and coordinate the activities of workers in branches, offices, or departments of such establishments as branch banks, brokerage firms, risk and insurance departments, or credit departments.
- Prepare financial and regulatory reports required by laws, regulations, and boards of directors.
- Prepare operational and risk reports for management analysis.
- Recruit staff members, and oversee training programs.
- Review collection reports to determine the status of collections and the amounts of outstanding balances.
- Review reports of securities transactions and price lists in order to analyze market conditions.
- Submit delinquent accounts to attorneys or outside agencies for collection.

Detailed Tasks

Detailed Work Activities:

- analyze financial data
- analyze market conditions
- analyze operational or management reports or records
- approve or deny credit applications
- approve or deny loans
- assign work to staff or employees
- compile data for financial reports
- conduct financial investigations
- conduct or attend staff meetings
- develop budgets
- develop management control systems
- develop policies, procedures, methods, or

- Match appropriations for specific programs with appropriations for broader programs, including items for emergency funds.
- Perform cost-benefit analyses to compare operating programs, review financial requests, or explore alternative financing methods.
- Provide advice and technical assistance with cost analysis, fiscal allocation, and budget preparation.
- Review operating budgets to analyze trends affecting budget needs.
- Seek new ways to improve efficiency and increase profits.
- Summarize budgets and submit recommendations for the approval or disapproval of funds requests.
- Testify before examining and fund-granting authorities, clarifying and promoting the proposed budgets.

Detailed Tasks

Detailed Work Activities:

- advise clients on financial matters
- analyze budgets
- analyze financial data
- analyze financial information to project future revenues or expense
- compile data for financial reports
- compute financial data
- consult with managerial or supervisory personnel
- develop budgets
- develop or maintain budgeting databases
- make presentations on financial matters
- make revenue forecasts
- monitor operational budget
- prepare financial reports
- prepare periodic reports comparing budgeted costs to actual costs
- use accounting or bookkeeping software
- use computers to enter, access and retrieve financial data
- use cost benefit analysis techniques
- use spreadsheet software

Technology - Examples

Accounting software

- Accounting software
- Deltek Costpoint
- Hyperion Enterprise

Analytical or scientific software

- Statistical software



standards

- direct and coordinate financial activities
- identify financial risks to company
- monitor credit extension decisions
- oversee execution of organizational or program policies
- prepare reports for management
- prepare required government reports
- review loan applications
- use government regulations
- use negotiation techniques

Technology - Examples

Accounting software

- Accounting software
- Automatic Data Processing EasyPay software
- Hyperion Enterprise
- Intuit QuickBooks
- Job costing software
- MYOB Premier Accounting Small Business Suite
- Sage Fixed Asset Solution FAS
- Sage MP Fund Accounting
- Sage Peachtree

Data base user interface and query software

- Database software
- Microsoft Access
- Oracle software
- Structured query language SQL

Electronic mail software

- Microsoft Outlook

Enterprise resource planning ERP software

- ADERANT Expert Back Office, Powered by Keystone
- Deltek software
- Enterprise resource planning ERP software
- Exact Software Macola ES
- Great Plains Dynamics software
- Hyperion Solutions System 9 Planning
- Microsoft Great Plains

Data base reporting software

- Business Objects Crystal Reports

Data base user interface and query software

- Microsoft Access
- On line analytical processing OLAP software
- Relational database software
- Structured query language SQL

Data mining software

- Extract, transform, load ETL software

Development environment software

- Microsoft Visual Basic

Electronic mail software

- Email software

Enterprise resource planning ERP software

- Adaptive Planning
- Budgeting, forecasting, and planning software
- Business performance management BPM software
- Cognos 8 Business Intelligence
- Cognos 8 Planning
- Enterprise resource planning ERP software
- Everest Software Advanced
- Extensity MPC
- FRx Software Microsoft Forecaster
- Lilly Software Associates VISUAL Enterprise
- Microsoft Dynamics GP
- NetSuite NetERP
- Open Systems TRAVERSE software
- Oracle PeopleSoft Enterprise software
- OutlookSoft
- Revelwood Business Performance Management software
- Sage Software Accpac ERP
- Sage Software Active Planner
- Sage Software MAS 200 ERP
- Sage Software MAS 90 ERP



- Oracle JD Edwards OneWorld

- Oracle PeopleSoft

- SAP software

- Solomon Software

Financial analysis software

- FRx software

- Hyperion Pillar software

- Oracle Financials

Human resources software

- Automatic Data Processing PC payroll for windows PCPW

Office suite software

- Microsoft Office

Presentation software

- Microsoft PowerPoint

Spreadsheet software

- Corel QuattroPro

- IBM Lotus 1-2-3

- Microsoft Excel

Word processing software

- Microsoft Word

Tools - Examples

- 10-key calculators

- Desktop computers

- Notebook computers

- Personal computers

- Personal digital assistants PDA

- Tablet computers

- SAP Business One

Financial analysis software

- Budget monitoring systems

- Financial reporting software

- Microsoft FRx

- Oracle Corporate Performance Management CPM software

- Satori Group proCube software

Graphics or photo imaging software

- Graphics software

Human resources software

- Human resources management system software

- Ultimate Software UltiPro Workforce Management

Object or component oriented development software

- Microsoft Visual Basic.NET

Presentation software

- Microsoft PowerPoint

- Presentation software

Spreadsheet software

- Microsoft Excel

- Spreadsheet software

Time accounting software

- Payroll software

- Time and attendance software

- Valiant Vantage

Word processing software

- Microsoft Word

- Word processing software

Tools - Examples

- Desktop computers

- Laser printers

- Notebook computers

- Personal computers

Labor Market Comparison

Maine Department of Labor.

Description	Treasurers and Controllers	Budget Analysts	Difference
Median Wage	\$ 67,670	\$ 57,290	\$(10,380)
10th Percentile Wage	\$ 41,820	\$ 39,480	\$(2,340)
25th Percentile Wage	N/A	N/A	N/A
75th Percentile Wage	\$ 89,670	\$ 67,800	\$(21,870)
90th Percentile Wage	\$119,660	\$ 78,930	\$(40,730)
Mean Wage	\$ 74,780	\$ 57,690	\$(17,090)
Total Employment - 2016	2,440	170	-2,270
Employment Base - 2006	2,692	163	-2,529
Projected Employment - 2025	2,881	168	-2,713
Projected Job Growth - 2006-2025	7.0 %	3.1 %	-3.9 %
Projected Annual Openings - 2006-2025	58	5	-53
Special			
Special Occupations:	★ Maine High Wage - In Demand		

National Job Posting Trends

Trend for Treasurers and Controllers and Budget Analysts



Data from [Indeed](http://Indeed.com)

Programs



Related Programs

Accounting

Accounting. A program that prepares individuals to practice the profession of accounting and to perform related business functions. Includes instruction in accounting principles and theory, financial accounting, managerial accounting, cost accounting, budget control, tax accounting, legal aspects of accounting, auditing, reporting procedures, statement analysis, planning and consulting, business information systems, accounting research methods, professional standards and ethics, and applications to specific for-profit, public, and non-profit organizations.

Institution	Address	City	URL
University of Maine at Augusta	46 University Dr	Augusta	www.uma.maine.edu/
Beal College	99 Farm Road	Bangor	bealcollege.edu
Husson College	One College Circle	Bangor	www.husson.edu
Husson College	One College Circle	Bangor	www.husson.edu
University of Maine at Machias	9 O'Brien Ave	Machias	www.umm.maine.edu
University of Maine		Orono	www.umaine.edu/
Andover College	901 Washington Ave	Portland	WWW.ANDOVERCOLLEGE.edu
Andover College	901 Washington Ave	Portland	WWW.ANDOVERCOLLEGE.edu
University of Southern Maine	96 Falmouth St	Portland	www.usm.maine.edu
University of Southern Maine	96 Falmouth St	Portland	www.usm.maine.edu
University of Maine at Presque Isle	181 Main St	Presque Isle	www.umpi.maine.edu
Saint Josephs College	278 Whites Bridge Rd	Standish	www.sjcme.edu
Saint Josephs College	278 Whites Bridge Rd	Standish	www.sjcme.edu
Thomas College	180 W River Rd	Waterville	www.thomas.edu
Thomas College	180 W River Rd	Waterville	www.thomas.edu
York County Community College	112 College Drive	Wells	www.yccc.edu

Finance, General

Finance, General. A program that generally prepares individuals to plan, manage, and analyze the financial and monetary aspects and performance of business enterprises, banking institutions, or other organizations. Includes instruction in principles of accounting; financial instruments; capital planning; funds acquisition; asset and debt management; budgeting; financial analysis; and investments and portfolio management.

Institution	Address	City	URL
Husson College	One College Circle	Bangor	www.husson.edu
Saint Josephs College	278 Whites Bridge Rd	Standish	www.sjcme.edu
Thomas College	180 W River Rd	Waterville	www.thomas.edu

Public Finance



Public Finance. A program that prepares individuals to manage the financial assets and budgets of public sector organizations. Includes instruction in public trusts and investments; the laws and procedures used to plan, prepare and administer public agency budgets; and the preparation and analysis of public budget projections and policies.

No information on schools for the program

Maine Statewide Promotion Opportunities for Treasurers and Controllers

O* NET Code	Title	Grand TORQ	Job Zone	Employment	Median Wage	Difference	Growth	Annual Job Openings	Special
11-3031.01	Treasurers and Controllers	100	5	2,440	\$67,670.00	\$0.00	7%	58	
13-2051.00	Financial Analysts	95	4	210	\$71,380.00	\$3,710.00	10%	4	
11-3041.00	Compensation and Benefits Managers	92	3	200	\$68,560.00	\$890.00	2%	5	
13-2052.00	Personal Financial Advisors	91	3	360	\$94,100.00	\$26,430.00	10%	13	
11-3031.02	Financial Managers, Branch or Department	89	4	2,440	\$67,670.00	\$0.00	7%	58	
11-2031.00	Public Relations Managers	87	4	290	\$71,020.00	\$3,350.00	9%	10	
23-1011.00	Lawyers	85	5	1,910	\$80,120.00	\$12,450.00	6%	73	★
25-1063.00	Economics Teachers, Postsecondary	85	5	80	\$73,830.00	\$6,160.00	11%	2	
11-1021.00	General and Operations Managers	83	4	8,490	\$77,050.00	\$9,380.00	-5%	209	
11-1011.00	Chief Executives	82	5	750	\$102,290.00	\$34,620.00	-6%	25	
11-2021.00	Marketing Managers	81	4	570	\$74,560.00	\$6,890.00	7%	17	
11-3061.00	Purchasing Managers	80	4	330	\$72,560.00	\$4,890.00	2%	11	★
11-2022.00	Sales Managers	80	4	1,310	\$72,720.00	\$5,050.00	3%	32	
23-1023.00	Judges, Magistrate Judges, and Magistrates	79	5	80	\$115,160.00	\$47,490.00	1%	2	★
11-3021.00	Computer and Information Systems Managers	78	5	870	\$83,130.00	\$15,460.00	8%	21	



Special Occupations: ★ Maine High Wage - In Demand

Maine Statewide Promotion Opportunities for Budget Analysts

O* NET Code	Title	Grand TORQ	Job Zone	Employment	Median Wage	Difference	Growth	Annual Job Openings	Special
13-2031.00	Budget Analysts	100	4	170	\$57,290.00	\$0.00	3%	5	
13-2051.00	Financial Analysts	91	4	210	\$71,380.00	\$14,090.00	10%	4	
11-3031.01	Treasurers and Controllers	90	5	2,440	\$67,670.00	\$10,380.00	7%	58	
11-3031.02	Financial Managers, Branch or Department	87	4	2,440	\$67,670.00	\$10,380.00	7%	58	
13-2052.00	Personal Financial Advisors	87	3	360	\$94,100.00	\$36,810.00	10%	13	
11-3041.00	Compensation and Benefits Managers	86	3	200	\$68,560.00	\$11,270.00	2%	5	
25-1063.00	Economics Teachers, Postsecondary	85	5	80	\$73,830.00	\$16,540.00	11%	2	
11-2031.00	Public Relations Managers	84	4	290	\$71,020.00	\$13,730.00	9%	10	
13-1081.00	Logisticians	83	4	190	\$59,120.00	\$1,830.00	4%	4	
11-2022.00	Sales Managers	82	4	1,310	\$72,720.00	\$15,430.00	3%	32	
11-3021.00	Computer and Information Systems Managers	82	5	870	\$83,130.00	\$25,840.00	8%	21	
23-1011.00	Lawyers	81	5	1,910	\$80,120.00	\$22,830.00	6%	73	★
11-9033.00	Education Administrators, Postsecondary	81	5	600	\$58,090.00	\$800.00	7%	21	
11-3042.00	Training and Development Managers	80	4	140	\$66,670.00	\$9,380.00	7%	4	
15-1061.00	Database Administrators	80	4	300	\$60,260.00	\$2,970.00	20%	11	

Special Occupations: ★ Maine High Wage - In Demand



Top Industries for Budget Analysts

Industry	NAICS	% of Industry	Employment	Projected Employment	% Change
Federal government, excluding postal service	919999	22.38%	13,843	13,086	-5.47%
Local government, excluding education and hospitals	939300	11.22%	6,942	7,799	12.34%
State government, excluding education and hospitals	929200	10.17%	6,292	6,175	-1.87%
Colleges, universities, and professional schools, public and private	611300	9.30%	5,754	6,437	11.87%
Management of companies and enterprises	551100	6.44%	3,983	4,591	15.28%
Aerospace product and parts manufacturing	336400	4.39%	2,716	2,766	1.84%
Elementary and secondary schools, public and private	611100	2.92%	1,806	1,903	5.38%
Management, scientific, and technical consulting services	541600	2.77%	1,714	3,060	78.52%
Navigational, measuring, electromedical, and control instruments manufacturing	334500	2.74%	1,693	1,621	-4.26%
Computer systems design and related services	541500	2.24%	1,385	1,870	35.02%
General medical and surgical hospitals, public and private	622100	1.63%	1,009	1,117	10.71%
Research and development in the physical, engineering, and life sciences	541710	1.54%	953	1,016	6.69%
Wired telecommunications carriers	517100	0.99%	614	482	-21.49%
Accounting, tax preparation, bookkeeping, and payroll services	541200	0.98%	606	719	18.60%
Junior colleges, public and private	611200	0.82%	510	563	10.49%

Top Industries for Treasurers and Controllers

Industry	NAICS	% of Industry	Employment	Projected Employment	% Change
Depository credit intermediation	522100	14.40%	72,902	74,327	1.95%
Management of companies and enterprises	551100	7.98%	40,411	46,586	15.28%
Securities and commodity contracts, brokerages, and exchanges	5231-2	4.05%	20,507	30,461	48.54%
Self-employed workers, primary job	000601	3.88%	19,649	20,934	6.54%
Local government, excluding education and hospitals	939300	3.51%	17,785	19,980	12.34%
Accounting, tax preparation, bookkeeping, and payroll services	541200	3.27%	16,571	19,653	18.60%



Other nondepository credit intermediation, including real estate credit and consumer lending	522290	2.84%	14,398	17,266	19.92%
Other financial investment activities	523900	2.56%	12,983	18,297	40.93%
Federal government, excluding postal service	919999	2.41%	12,222	11,554	-5.47%
Colleges, universities, and professional schools, public and private	611300	1.72%	8,734	9,771	11.87%
General medical and surgical hospitals, public and private	622100	1.68%	8,503	9,414	10.71%
Automobile dealers	441100	1.61%	8,167	9,265	13.44%
Direct insurance (except life, health, and medical) carriers	524120	1.58%	8,009	8,371	4.52%
State government, excluding education and hospitals	929200	1.57%	7,953	7,804	-1.87%
Computer systems design and related services	541500	1.40%	7,071	9,548	35.02%



TORQ Analysis of Treasurers and Controllers to Auditors

ANALYSIS INPUT					
Transfer	Title	O*NET	Filters		
From Title:	Treasurers and Controllers	11-3031.01	Abilities:	Importance Level: 50	Weight: 1
To Title:	Auditors	13-2011.02	Skills:	Importance Level: 69	Weight: 1
Labor Market Area:	Maine Statewide		Knowledge:	Importance Level: 69	Weight: 1

TORQ RESULTS	
Grand TORQ:	91

Ability TORQ		Skills TORQ		Knowledge TORQ	
Level	90	Level	92	Level	90

Gaps To Narrow if Possible				Upgrade These Skills				Knowledge to Add			
Ability	Level	Gap	Imp	Skill	Level	Gap	Imp	Knowledge	Level	Gap	Imp
Number Facility	78	18	78	Active Learning	78	11	73	Sales and Marketing	42	16	88
Flexibility of Closure	62	20	68	Speaking	69	2	74				
Inductive Reasoning	69	14	84								
Near Vision	71	14	84								
Selective Attention	55	14	68								
Perceptual Speed	50	13	65								
Oral Expression	71	9	81								
Written Comprehension	69	7	87								
Oral Comprehension	67	7	84								
Mathematical Reasoning	66	7	78								
Deductive Reasoning	67	7	75								
Category Flexibility	55	7	65								
Information Ordering	57	6	75								
Written Expression	64	5	75								
Speed of Closure	48	6	53								
Time Sharing	39	5	53								
Problem Sensitivity	67	3	84								
Finger Dexterity	39	4	56								
Fluency of Ideas	50	4	50								
Memorization	41	4	50								
Speech Recognition	55	2	78								

LEVEL and IMPT (IMPORTANCE) refer to the Target Auditors. GAP refers to level difference between Treasurers and Controllers and Auditors.

ASK ANALYSIS

Ability Level Comparison - Abilities with importance scores over 50

Description	Treasurers and Controllers	Auditors	Importance
Written Comprehension	62	69	87
Oral Comprehension	60	67	84
Problem Sensitivity	64	67	84
Inductive Reasoning	55	69	84
Near Vision	57	71	84
Oral Expression	62	71	81
Mathematical Reasoning	59	66	78
Number Facility	60	78	78
Speech Recognition	53	55	78
Speech Clarity	51	51	78
Written Expression	59	64	75
Deductive Reasoning	60	67	75
Information Ordering	51	57	75
Flexibility of Closure	42	62	68
Selective Attention	41	55	68
Category Flexibility	48	55	65
Perceptual Speed	37	50	65
Finger Dexterity	35	39	56
Speed of Closure	42	48	53
Time Sharing	34	39	53
Fluency of Ideas	46	50	50
Memorization	37	41	50
Far Vision	42	42	50

Skill Level Comparison - Abilities with importance scores over 69

Description	Treasurers and Controllers	Auditors	Importance
Speaking	67	69	74
Active Learning	67	78	73

Knowledge Level Comparison - Knowledge with importance scores over 69

Description	Treasurers and Controllers	Auditors	Importance
Sales and Marketing	26	42	88

**Experience & Education Comparison**

Related Work Experience Comparison			Required Education Level Comparison		
Description	Treasurers and Controllers	Auditors	Description	Treasurers and Controllers	Auditors
10+ years	54%	5%	Doctoral	0%	0%
8-10 years	10%	6%	Professional Degree	0%	0%
6-8 years	6%	9%	Post-Masters Cert	4%	0%
4-6 years	15%	5%	Master's Degree	55%	0%
2-4 years	8%	13%	Post-Bachelor Cert	0%	5%
1-2 years	3%	6%	Bachelors	28%	94%
6-12 months	1%	17%	AA or Equiv	3%	0%
3-6 months	0%	0%	Some College	6%	0%
1-3 months	0%	0%	Post-Secondary Certificate	0%	0%
0-1 month	0%	0%	High School Diploma or GED	0%	0%
None	0%	34%	No HSD or GED	0%	0%

Treasurers and Controllers	Auditors
Most Common Educational/Training Requirement:	
Bachelor's or higher degree, plus work experience	Bachelor's degree
Job Zone Comparison	
5 - Job Zone Five: Extensive Preparation Needed Extensive skill, knowledge, and experience are needed for these occupations. Many require more than five years of experience. For example, surgeons must complete four years of college and an additional five to seven years of specialized medical training to be able to do their job. A bachelor's degree is the minimum formal education required for these occupations. However, many also require graduate school. For example, they may require a master's degree, and some require a Ph.D., M.D., or J.D. (law degree). Employees may need some on-the-job training, but most of these occupations assume that the person will already have the required skills, knowledge, work-related experience, and/or training.	4 - Job Zone Four: Considerable Preparation Needed A minimum of two to four years of work-related skill, knowledge, or experience is needed for these occupations. For example, an accountant must complete four years of college and work for several years in accounting to be considered qualified. Most of these occupations require a four - year bachelor's degree, but some do not. Employees in these occupations usually need several years of work-related experience, on-the-job training, and/or vocational training.

Tasks

Treasurers and Controllers	Auditors
Core Tasks	Core Tasks
Generalized Work Activities: <ul style="list-style-type: none"> Getting Information - Observing, receiving, and otherwise obtaining information from all relevant sources. Selling or Influencing Others - Convincing others to buy merchandise/goods or to otherwise change their minds or actions. Interacting With Computers - Using computers and computer systems (including hardware and software) to program, write software, set up functions, enter data, or process information. Establishing and Maintaining Interpersonal Relationships - Developing constructive and 	Generalized Work Activities: <ul style="list-style-type: none"> Interacting With Computers - Using computers and computer systems (including hardware and software) to program, write software, set up functions, enter data, or process information. Analyzing Data or Information - Identifying the underlying principles, reasons, or facts of information by breaking down information or data into separate parts. Processing Information - Compiling, coding, categorizing, calculating, tabulating, auditing, or verifying information or data. Getting Information - Observing, receiving,



cooperative working relationships with others, and maintaining them over time.

- Performing for or Working Directly with the Public - Performing for people or dealing directly with the public. This includes serving customers in restaurants and stores, and receiving clients or guests.

Specific Tasks

Occupation Specific Tasks:

- Analyze and classify risks and investments to determine their potential impacts on companies.
- Approve or reject, or coordinate the approval and rejection of, lines of credit and commercial, real estate, and personal loans.
- Communicate with stockholders and other investors to provide information, and to raise capital.
- Develop and analyze information to assess the current and future financial status of firms.
- Direct insurance negotiations, select insurance brokers and carriers, and place insurance.
- Establish and maintain relationships with individual and business customers, and provide assistance with problems these customers may encounter.
- Establish procedures for custody and control of assets, records, loan collateral, and securities, in order to ensure safekeeping.
- Evaluate data pertaining to costs in order to plan budgets.
- Evaluate financial reporting systems, accounting and collection procedures, and investment activities, and make recommendations for changes to procedures, operating systems, budgets, and other financial control functions.
- Examine, evaluate, and process loan applications.
- Network within communities to find and attract new business.
- Oversee the flow of cash and financial instruments.
- Plan, direct, and coordinate risk and insurance programs of establishments to control risks and losses.
- Plan, direct, and coordinate the activities of workers in branches, offices, or departments of such establishments as branch banks, brokerage firms, risk and insurance departments, or credit departments.
- Prepare financial and regulatory reports required by laws, regulations, and boards of directors.
- Prepare operational and risk reports for management analysis.
- Recruit staff members, and oversee training programs.
- Review collection reports to determine the status of collections and the amounts of

and otherwise obtaining information from all relevant sources.

- Documenting/Recording Information - Entering, transcribing, recording, storing, or maintaining information in written or electronic/magnetic form.

Specific Tasks

Occupation Specific Tasks:

- Advise clients in areas such as compensation, employee health care benefits, the design of accounting or data processing systems, or long-range tax or estate plans.
- Advise management about issues such as resource utilization, tax strategies, and the assumptions underlying budget forecasts.
- Analyze business operations, trends, costs, revenues, financial commitments, and obligations, to project future revenues and expenses or to provide advice.
- Appraise, evaluate, and inventory real property and equipment, recording information such as the description, value and location of property.
- Compute taxes owed and prepare tax returns, ensuring compliance with payment, reporting or other tax requirements.
- Develop, implement, modify, and document recordkeeping and accounting systems, making use of current computer technology.
- Develop, maintain, and analyze budgets, preparing periodic reports that compare budgeted costs to actual costs.
- Establish tables of accounts and assign entries to proper accounts.
- Investigate bankruptcies and other complex financial transactions and prepare reports summarizing the findings.
- Maintain or examine the records of government agencies.
- Prepare forms and manuals for accounting and bookkeeping personnel, and direct their work activities.
- Prepare, examine, or analyze accounting records, financial statements, or other financial reports to assess accuracy, completeness, and conformance to reporting and procedural standards.
- Provide internal and external auditing services for businesses or individuals.
- Report to management regarding the finances of establishment.
- Represent clients before taxing authorities and provide support during litigation involving financial issues.
- Serve as bankruptcy trustees or business valuers.
- Survey operations to ascertain accounting needs and to recommend, develop, or maintain solutions to business and financial problems.
- Work as Internal Revenue Service (IRS) agents.



outstanding balances.

- Review reports of securities transactions and price lists in order to analyze market conditions.
- Submit delinquent accounts to attorneys or outside agencies for collection.

Detailed Tasks

Detailed Work Activities:

- analyze financial data
- analyze market conditions
- analyze operational or management reports or records
- approve or deny credit applications
- approve or deny loans
- assign work to staff or employees
- compile data for financial reports
- conduct financial investigations
- conduct or attend staff meetings
- develop budgets
- develop management control systems
- develop policies, procedures, methods, or standards
- direct and coordinate financial activities
- identify financial risks to company
- monitor credit extension decisions
- oversee execution of organizational or program policies
- prepare reports for management
- prepare required government reports
- review loan applications
- use government regulations
- use negotiation techniques

Technology - Examples

Accounting software

- Accounting software
- Automatic Data Processing EasyPay software
- Hyperion Enterprise
- Intuit QuickBooks
- Job costing software
- MYOB Premier Accounting Small Business Suite
- Sage Fixed Asset Solution FAS
- Sage MP Fund Accounting
- Sage Peachtree

Data base user interface and query software

- Database software
- Microsoft Access

Detailed Tasks

Detailed Work Activities:

- advise clients on financial matters
- analyze applicant's financial status
- analyze budgets
- analyze financial data
- analyze financial information to project future revenues or expense
- appraise, evaluate, or inventory real property or equipment
- compile data for financial reports
- compute financial data
- compute taxes
- conduct financial investigations
- confer with taxpayer or representative
- determine tax liability according to prescribed laws
- develop budgets
- develop or maintain budgeting databases
- direct and coordinate financial activities
- evaluate degree of financial risk
- fill out business or government forms
- follow tax laws or regulations
- inspect account books or system for efficiency, effectiveness, or acceptability
- maintain account records
- maintain record of organization expenses
- make revenue forecasts
- note discrepancies in financial records
- obtain financial information from individuals
- perform general financial analysis
- prepare audit reports or recommendations
- prepare financial reports
- prepare periodic reports comparing budgeted costs to actual costs
- prepare tax reports
- prepare tax returns
- use accounting or bookkeeping software
- use accounting terminology
- use computers to enter, access and retrieve financial data
- use cost benefit analysis techniques
- use spreadsheet software
- use statistical cost estimation methods
- verify bank or financial transactions
- write administrative procedures services manual

Technology - Examples

Analytical or scientific software

- SAS software

Compliance software



- MICROSOFT ACCESS

- Oracle software
- Structured query language SQL

Electronic mail software

- Microsoft Outlook

Enterprise resource planning ERP software

- ADERANT Expert Back Office, Powered by Keystone
- Deltek software
- Enterprise resource planning ERP software
- Exact Software Macola ES
- Great Plains Dynamics software
- Hyperion Solutions System 9 Planning
- Microsoft Great Plains
- Oracle JD Edwards OneWorld
- Oracle PeopleSoft
- SAP software
- Solomon Software

Financial analysis software

- FRx software
- Hyperion Pillar software
- Oracle Financials

Human resources software

- Automatic Data Processing PC payroll for windows PCPW

Office suite software

- Microsoft Office

Presentation software

- Microsoft PowerPoint

Spreadsheet software

- Corel QuattroPro
- IBM Lotus 1-2-3
- Microsoft Excel

Word processing software

- Microsoft Word

Tools - Examples

- 10-key calculators

- Accounting compliance software
- Bi3 Audit Intelligence
- Corporate Responsibility System Technologies Limited Compliance Positioning System
- FLS eDP PAYROLLtax
- Intrax ProcedureNet
- Lumigent Entegra
- Paisley Cardmap
- Paisley Focus Control Assurance
- Paisley RiskNavigator
- Tax compliance property tax management software
- TrendTracker Compliance Solution

Data base user interface and query software

- Microsoft Access

Financial analysis software

- Accounting fraud detection software
- ACL Business Assurance Analytics
- Audit management software
- Audit planning and control environment software
- AuditTracker software
- AuditWare CaseWare Examiner
- AuditWare software
- Automated auditors fraud detector software
- Bi3 Financial Statement Fraud Analysis
- BizBench Benchmarking Software
- BNA Corporate Tax Audit Analyzer
- Brentmark Estate Planning Quickview
- Cammack Computations Inter-Est
- CaseWare International IDEA
- CaseWare International IDEA SmartAnalyzer
- CaseWare Working Papers
- CashFlow Guardian
- Cebos MQ1 Audit System



- Desktop computers

- Notebook computers

- Personal computers

- Personal digital assistants PDA

- Tablet computers

- Choice Technologies PowerBill +

- D'Arcangelo Galileo

- Datavantage software

- Digital analysis tests and statistics DATAS for Excel

- Digital analysis tests and statistics DATAS for SAS

- Financial Competence

- IAD Audit Leverage

- InformationActive ActiveData for Excel

- Internal audit software

- Kirix ProffiPoint

- MethodWare ProAudit Advisor

- OSI TrustWise

- Paisley AutoAudit

- Paisley IssueTrack

- Palisade @ Risk

- Payables Tests Sets for ACL software

- Pentana audit work system PAWS

- Pleier Audit Management System

- PricewaterhouseCoopers TeamMate

- PSI software

- Recovery audit software

- RSM McGladrey Advanced Practice Solutions Paperless Audit

- RSM McGladrey Auditor Assistant

- Sampson Data Pattern Index software

- Solutions Technology & Software HR Premier

- Star Software Fixed Asset Depreciation

- Star Software Materiality Calculator

- Thomson Creative Solutions Engagement CS

- Thomson Creative Solutions Financial Analysis CS

- Thomson PPC e-Tools Suite

- TimeValue software

- Tropics software



Spreadsheet software

- Microsoft Excel

- Spreadsheet software

Time accounting software

- WorkForce Software EmpCenter Time and Attendance

Tools - Examples

- 10-key calculators

- Desktop computers

- Notebook computers

- Personal computers

- Personal digital assistants PDA

- Scanners

- Tablet computers

Labor Market Comparison

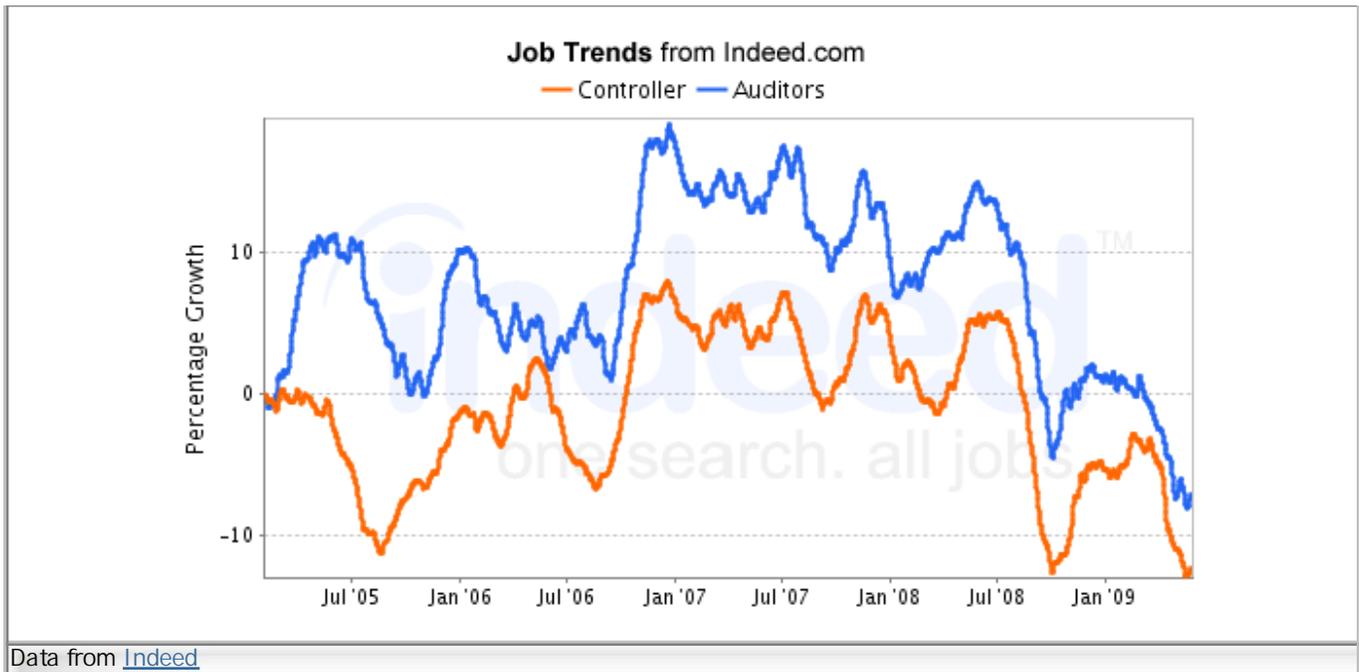
Maine Department of Labor.

Description	Treasurers and Controllers	Auditors	Difference
Median Wage	\$ 67,670	\$ 48,110	\$(19,560)
10th Percentile Wage	\$ 41,820	\$ 33,700	\$(8,120)
25th Percentile Wage	N/A	N/A	N/A
75th Percentile Wage	\$ 89,670	\$ 62,620	\$(27,050)
90th Percentile Wage	\$119,660	\$ 81,400	\$(38,260)
Mean Wage	\$ 74,780	\$ 53,860	\$(20,920)
Total Employment - 2016	2,440	3,250	810
Employment Base - 2006	2,692	3,967	1,275
Projected Employment - 2025	2,881	4,395	1,514
Projected Job Growth - 2006-2025	7.0 %	10.8 %	3.8 %
Projected Annual Openings - 2006-2025	58	113	55
Special			

Special Occupations: ☆ Maine High Wage - In Demand

National Job Posting Trends

Trend for Treasurers and Controllers and Auditors



Programs

Related Programs

Accounting

Accounting. A program that prepares individuals to practice the profession of accounting and to perform related business functions. Includes instruction in accounting principles and theory, financial accounting, managerial accounting, cost accounting, budget control, tax accounting, legal aspects of accounting, auditing, reporting procedures, statement analysis, planning and consulting, business information systems, accounting research methods, professional standards and ethics, and applications to specific for-profit, public, and non-profit organizations.

Institution	Address	City	URL
University of Maine at Augusta	46 University Dr	Augusta	www.uma.maine.edu/
Beal College	99 Farm Road	Bangor	bealcollege.edu
Husson College	One College Circle	Bangor	www.husson.edu
Husson College	One College Circle	Bangor	www.husson.edu
University of Maine at Machias	9 O'Brien Ave	Machias	www.umm.maine.edu
University of Maine		Orono	www.umaine.edu/
Andover College	901 Washington Ave	Portland	WWW.ANDOVERCOLLEGE.edu
Andover College	901 Washington Ave	Portland	WWW.ANDOVERCOLLEGE.edu
University of Southern Maine	96 Falmouth St	Portland	www.usm.maine.edu
University of Southern Maine	96 Falmouth St	Portland	www.usm.maine.edu
University of Maine at Presque Isle	181 Main St	Presque Isle	www.umpi.maine.edu
Saint Josephs College	278 Whites Bridge Rd	Standish	www.sjcme.edu
Saint Josephs College	278 Whites Bridge Rd	Standish	www.sjcme.edu



Thomas College	180 W River Rd	Waterville	www.thomas.edu
Thomas College	180 W River Rd	Waterville	www.thomas.edu
York County Community College	112 College Drive	Wells	www.yccc.edu

Accounting and Business/Management

Accounting and Business/Management. An integrated or combined program in accounting and business administration/management that prepares individuals to function as accountants and business managers.

No information on schools for the program

Accounting and Computer Science

Accounting and Computer Science. A program that combines accounting with computer science and/or computer studies.

No information on schools for the program

Accounting and Finance

Accounting and Finance. An integrated or combined program in accounting and finance that prepares individuals to function as accountants and financial managers or analysts.

Institution	Address	City	URL
University of Southern Maine	96 Falmouth St	Portland	www.usm.maine.edu

Auditing

Auditing. A program that prepares individuals, including certified accountants, to perform independent internal and external appraisals to evaluate organizational financial and operational activities, ensure compliance with laws and policies, safeguard assets, and promote effective planning and resource allocation. Includes instruction in advanced accounting, audit tools and techniques, sampling, risk and control, audit planning, audit function management, law and regulations, environmental auditing, information technology applications, professional standards and ethics, and specific industry and service sector problems.

No information on schools for the program

Taxation

Taxation. A program that prepares individuals to provide tax advice and management services to individuals and corporations. Includes instruction in tax law and regulations, tax record systems, individual and corporate income taxation, tax planning, partnerships and fiduciary relationships, estates and trusts, property depreciation, capital gains and losses, dispositions, transfers, liquidity, valuation, and applications to specific tax problems.

Institution	Address	City	URL
Thomas College	180 W River Rd	Waterville	www.thomas.edu

Maine Statewide Promotion Opportunities for Treasurers and Controllers

O*NET Code	Title	Grand TORQ	Job Zone	Employment	Median Wage	Difference	Growth	Annual Job Openings	Special
11-3031.01	Treasurers and Controllers	100	5	2,440	\$67,670.00	\$0.00	7%	58	
13-2051.00	Financial Analysts	95	4	210	\$71,380.00	\$3,710.00	10%	4	



11-3041.00	Compensation and Benefits Managers	92	3	200	\$68,560.00	\$890.00	2%	5	
13-2052.00	Personal Financial Advisors	91	3	360	\$94,100.00	\$26,430.00	10%	13	
11-3031.02	Financial Managers, Branch or Department	89	4	2,440	\$67,670.00	\$0.00	7%	58	
11-2031.00	Public Relations Managers	87	4	290	\$71,020.00	\$3,350.00	9%	10	
23-1011.00	Lawyers	85	5	1,910	\$80,120.00	\$12,450.00	6%	73	★
25-1063.00	Economics Teachers, Postsecondary	85	5	80	\$73,830.00	\$6,160.00	11%	2	
11-1021.00	General and Operations Managers	83	4	8,490	\$77,050.00	\$9,380.00	-5%	209	
11-1011.00	Chief Executives	82	5	750	\$102,290.00	\$34,620.00	-6%	25	
11-2021.00	Marketing Managers	81	4	570	\$74,560.00	\$6,890.00	7%	17	
11-2022.00	Sales Managers	80	4	1,310	\$72,720.00	\$5,050.00	3%	32	
11-3061.00	Purchasing Managers	80	4	330	\$72,560.00	\$4,890.00	2%	11	★
23-1023.00	Judges, Magistrate Judges, and Magistrates	79	5	80	\$115,160.00	\$47,490.00	1%	2	★
11-3021.00	Computer and Information Systems Managers	78	5	870	\$83,130.00	\$15,460.00	8%	21	

Special Occupations: ★ Maine High Wage - In Demand

Maine Statewide Promotion Opportunities for Auditors

O*NET Code	Title	Grand TORQ	Job Zone	Employment	Median Wage	Difference	Growth	Annual Job Openings	Special
13-2011.02	Auditors	100	4	3,250	\$48,110.00	\$0.00	11%	113	
13-2052.00	Personal Financial Advisors	94	3	360	\$94,100.00	\$45,990.00	10%	13	
13-2051.00	Financial Analysts	92	4	210	\$71,380.00	\$23,270.00	10%	4	
13-2072.00	Loan Officers	92	3	1,450	\$49,380.00	\$1,270.00	9%	29	
13-2053.00	Insurance Underwriters	92	3	460	\$56,090.00	\$7,980.00	-1%	12	
11-3031.01	Treasurers and Controllers	91	5	2,440	\$67,670.00	\$19,560.00	7%	58	



11-3031.02	Financial Managers, Branch or Department	91	4	2,440	\$67,670.00	\$19,560.00	7%	58	
19-3011.00	Economists	90	5	50	\$49,150.00	\$1,040.00	2%	2	
13-2061.00	Financial Examiners	90	4	120	\$55,110.00	\$7,000.00	3%	2	
41-1012.00	First-Line Supervisors/Managers of Non-Retail Sales Workers	90	4	930	\$55,220.00	\$7,110.00	-1%	19	
13-2011.01	Accountants	89	4	3,250	\$48,110.00	\$0.00	11%	113	
13-2031.00	Budget Analysts	88	4	170	\$57,290.00	\$9,180.00	3%	5	
13-1031.01	Claims Examiners, Property and Casualty Insurance	88	3	1,570	\$49,360.00	\$1,250.00	3%	44	★
19-3021.00	Market Research Analysts	88	4	200	\$49,960.00	\$1,850.00	3%	2	
25-1063.00	Economics Teachers, Postsecondary	87	5	80	\$73,830.00	\$25,720.00	11%	2	

Special Occupations: ★ Maine High Wage - In Demand

Top Industries for Auditors

Industry	NAICS	% of Industry	Employment	Projected Employment	% Change
Accounting, tax preparation, bookkeeping, and payroll services	541200	21.37%	272,351	355,310	30.46%
Self-employed workers, primary job	000601	7.79%	99,236	105,724	6.54%
Management of companies and enterprises	551100	5.38%	68,525	86,895	26.81%
Local government, excluding education and hospitals	939300	3.32%	42,296	52,267	23.57%
State government, excluding education and hospitals	929200	3.06%	39,011	42,109	7.94%
Depository credit intermediation	522100	2.04%	26,041	26,549	1.95%
Colleges, universities, and professional schools, public and private	611300	2.01%	25,611	28,652	11.87%
Federal government, excluding postal service	919999	1.85%	23,630	20,105	-14.92%
Self-employed workers, secondary job	000602	1.75%	22,317	22,217	-0.45%
Management, scientific, and technical consulting services	541600	1.45%	18,502	36,334	96.38%
Employment services	561300	1.43%	18,183	25,315	39.22%
Computer systems design and related services	541500	1.21%	15,429	22,915	48.52%
General medical and surgical hospitals, public and private	622100	1.16%	14,756	16,337	10.71%
Office administrative services	561100	1.09%	13,937	19,438	39.47%



Other financial investment activities	523900	1.03%	13,154	20,391	55.02%
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Top Industries for Treasurers and Controllers

Industry	NAICS	% of Industry	Employment	Projected Employment	% Change
Depository credit intermediation	522100	14.40%	72,902	74,327	1.95%
Management of companies and enterprises	551100	7.98%	40,411	46,586	15.28%
Securities and commodity contracts, brokerages, and exchanges	5231-2	4.05%	20,507	30,461	48.54%
Self-employed workers, primary job	000601	3.88%	19,649	20,934	6.54%
Local government, excluding education and hospitals	939300	3.51%	17,785	19,980	12.34%
Accounting, tax preparation, bookkeeping, and payroll services	541200	3.27%	16,571	19,653	18.60%
Other nondepository credit intermediation, including real estate credit and consumer lending	522290	2.84%	14,398	17,266	19.92%
Other financial investment activities	523900	2.56%	12,983	18,297	40.93%
Federal government, excluding postal service	919999	2.41%	12,222	11,554	-5.47%
Colleges, universities, and professional schools, public and private	611300	1.72%	8,734	9,771	11.87%
General medical and surgical hospitals, public and private	622100	1.68%	8,503	9,414	10.71%
Automobile dealers	441100	1.61%	8,167	9,265	13.44%
Direct insurance (except life, health, and medical) carriers	524120	1.58%	8,009	8,371	4.52%
State government, excluding education and hospitals	929200	1.57%	7,953	7,804	-1.87%
Computer systems design and related services	541500	1.40%	7,071	9,548	35.02%

Industry & Occupational Data Sources

TORQ Results: The TORQ Scores is based upon an proprietary algorithm applied against Knowledge, Skills and Ability levels and importance derived from O*NET 12.

ASK Analysis, Experience & Education Levels and Tasks: O*Net 12

Labor Market Comparisons Occupational Projections data from Maine Department of Labor

National Posting Trends Indeed.com

Labor Pool & Promotions Opportunities: Occupational Projections data from Maine Department of Labor

Top Industries: Occupational Employment Statistics program (U.S. Bureau of Labor Statistics)