

Job Title: Financial Planning & Analysis Assistant	Location: Hunmanby
Department: Finance	Contract: Permanent
Reports To: FP&A Manager	Direct Report: N/A

1.0 Job Summary & Role

- Reporting to the Financial Planning & Analysis Manager you will play a key role in supporting the preparation of timely and accurate financial results for the Business
- With an understanding of financial metrics to support strategic decision making, you will utilise different data sources to present informative and valuable information to different stakeholders of the business
- Support the FP&A Manager in various weekly and monthly tasks & reports to be shared with Managers, Directors and the Parent Group
- Support the development of Power BI Dashboards for producing weekly and monthly financial information that will measure performance, aid decision making and forecasting decisions

2.0 Key Responsibilities & Main Duties

- Weekly KPI & cash flow reporting across the business
- Help to prepare monthly executive reports with accuracy and explanation of the results
- Key performance metrics analysis including: Sales revenue, Gross margin, EBITDA, Comparisons (performance vs. prior year, budget and forecast), Primary Working Capital and Cash Flows
- Support the FP&A Manager in month end reporting and commentary – understanding the results and explaining them
- Drive continuous improvement of Business Group Reports – improving format, speed, and the detail provided – development of Power BI dashboards that can be shared with the business
- Overhead reporting and analysis to support various departments within the business and provide a high level summary of OPEX spend
- Diving into further sales analysis including customers, products and regions.
- Spot trends and data connections
- Support the business in the LRP and budget planning process, including preparing presentations and models where necessary
- Play a key role in the forecast cycles of the business – modelling, preparing and loading into the consolidation software



3.0 Internal & External Relationships

- Developing relationships with people in the Finance Team is important as well as building relationships and working with various departments across the company
- This role requires the individual to work across different businesses and therefore numerous teams of people; building solid working relationships is pivotal to the role
- The work produced by the FP&A Team will be presented to and used by leaders of the Business Group so building relationships at this level is also important

4.0 Key Performance Indicators

- Preparation of reports for the Business Group
- Explanation of results
- Meeting deadlines for reports, accuracy and informative

5.0 Essential/Desirable Factors

- Higher-level qualification in Finance, Economics, or other course of similar study
- Highly proficient in Microsoft Excel
- Basic knowledge in data analytics tools is a plus
- Dedicated team player who will enthusiastically support the wider team on executing joint missions
- Excellent verbal and written communication skills
- Capable of adapting to fast-paced environments and delivering results in varying situations
- Someone looking to take the next steps in their finance journey

Knowledge	
Essential: • Understanding P&L, profitability analysis and financial metrics • Sales analysis	Desirable: • Forecasting & budgeting • In depth sales analysis
Skills & Attributes	
Essential: • Teamwork • Excel & PowerPoint skills • Ability to converse with people from across the business • Attention to detail.	Desirable: • Data analytics (e.g. Power Bi) • Presentation skills
Experience	
Essential: • Financial reporting • KPI reporting	Desirable: • Bridge analysis experience • US GAAP Reporting



JOB DESCRIPTION & PERSON SPECIFICATION



	Reconciliation of management accounts to management reports
Qualifications	
Essential: Finance Qualification (AAT) or equivalent	Desirable: CIMA qualified

Created by	Dated Created
FP & A Manager	12/11/2025

