

<b>Job Title:</b> Financial Planning Analyst	<b>Location:</b> Hunmanby
<b>Department:</b> Finance	<b>Contract:</b> Permanent
<b>Reports To:</b> FP&A Manager	<b>Direct Report:</b> 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
- The role is based at our HQ in Hunmanby, North Yorkshire. The successful candidate will be expected to work primarily from this location; however, there will be an occasional requirement to travel as needed to support other sites, attend meetings, or assist with project work

## 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	
<b>Essential:</b> <ul style="list-style-type: none"> <li>• Understanding P&amp;L, profitability analysis and financial metrics</li> <li>• Sales analysis</li> </ul>	<b>Desirable:</b> <ul style="list-style-type: none"> <li>• Forecasting &amp; budgeting</li> <li>• In depth sales analysis</li> </ul>
Skills & Attributes	
<b>Essential:</b> <ul style="list-style-type: none"> <li>• Teamwork</li> <li>• Excel &amp; Powerpoint skills</li> <li>• Ability to converse with people from across the business</li> <li>• Attention to detail</li> </ul>	<b>Desirable:</b> <ul style="list-style-type: none"> <li>• Data analytics (eg Power Bi)</li> <li>• Presentation skills</li> </ul>
Experience	
<b>Essential:</b>	<b>Desirable:</b>



## JOB DESCRIPTION & PERSON SPECIFICATION



<ul style="list-style-type: none"> <li>• Financial reporting</li> <li>• KPI reporting</li> </ul>	<ul style="list-style-type: none"> <li>• Bridge analysis experience</li> <li>• US GAAP Reporting</li> <li>• Reconciliation of management accounts to management reports</li> </ul>
<b>Qualifications</b>	
<b>Essential:</b> <ul style="list-style-type: none"> <li>• Finance Qualification (AAT) or part Qualified(CIMA or equivalent)</li> <li>• Experience in Financial environment</li> </ul>	<b>Desirable:</b> <ul style="list-style-type: none"> <li>• CIMA qualified</li> </ul>

<b>Created by</b>	<b>Dated Created</b>
Financial Planning and Analysis Manager	01/01/2026

