

Recruitment pack

Assistant Financial Analyst

(12 month fixed-term contract)

Grade 3



Leadership
Innovation
Teamwork
Self-management
Recruitment
Commercial awareness
Customer focus
Best practice
Excellence
Opportunity



aat

Job description

Job title:	Assistant Financial Analyst
Division:	Finance, Procurement & Facilities
Date:	May 2015
Reporting to:	Financial Analyst
Main contacts:	Financial Planning and Analysis team, and the wider Finance team, plus the AAT Executive team and business managers.

Major objectives

To contribute to the achievement of AAT's business plan objectives and the efficiency and effectiveness of the organisation by:

- by producing accurate and meaningful financial and business analysis on the sales and profitability of AAT's customers, products, and operations, as well as working with the rest of the finance team to ensure that the month end Income accounts and management pack are accurately prepared within the set deadlines.

Responsibilities

- Provide monthly sales volume reports and key performance indicator analyses as well as weekly sales volume analyses to the business, including meaningful commentary on key variances and figures.
- Provide the financial analysis required for inclusion in board papers.
- Assist in the production of the monthly management accounts by posting journals e.g. for membership income (current and deferred), lapsing provisions and events income.
- Ensure regular monthly reconciliations of the various key income streams are prepared and thereby, ensure that adequate controls are implemented to ensure completeness of income.
- Ensure that the month end schedules for the monthly management pack are prepared in a timely manner and in accordance with set deadlines.
- Assist the Financial Analyst in the production of the monthly performance pack for the Executive team.
- Assist in providing financial information and analysis to aid decision making.
- Provide cover for the Financial Analyst with regards to month end responsibilities including, but not limited to, investment portfolio postings and reconciliations and short term deposits postings.
- Provide support to the Financial Analyst and Financial Planning & Analysis Manager on specific projects and ad hoc business analysis requests.
- Undertake due diligence reviews of potential 3rd party suppliers to support AAT's procurement process.

Customer centricity

- Develop friendly, positive and supportive relationships with external and internal customers, and to provide them with excellent service.

- Actively to learn from customer feedback, comments and suggestions, including complaints, to review and improve existing processes, and by doing so to anticipate other customers' needs. To communicate this knowledge to relevant colleagues.
- Meet and exceed teams' customer service standards.
- Understand situations from the customers' perspective so that appropriate and relevant solutions can be identified.

Corporate social responsibility

- Apply the principles of the CSR policy in your daily role, particularly reduce-reuse-recycle.
- Adhere to AAT's responsible business practices, such as high standards of governance, raising employment standards for employees and forming trade and community partnerships with appropriate organisations.

General

- Carry out any other duties as may reasonably be requested by the line manager.
- Work in such a way as to minimise the risks to the information technology environment safely, securely and confidently.
- Have regard for your own actions and those of others in the interests of safety.
- Contribute to the tidiness of the office.

This job description does not form part of your contract of employment.

Person specification

Area	Description	Essential or desirable
Knowledge	Competent Excel user.	E
	Knowledge of basic financial procedures (particularly revenue and deferred income recognition) and performing accounting reconciliations.	E
	Knowledge of Microsoft Dynamics AX 2012.	D
	Knowledge of Microsoft CRM (or similar database) and extracting data from the system.	D
	Other Microsoft packages: Word, Outlook and PowerPoint.	E
Skills	Strong financial, analytical, and verbal and written communication skills, including the ability to interpret financial information and present to non-finance people.	E
	Good time management skills.	E
	Innovative approach to problem solving.	E
Experience	Experience of organising individual workload and meeting deadlines.	E
	Manipulating high volumes of financial data to produce meaningful analysis.	E
	Improving the production and presentation of financial reports.	D
	Experience of working in a similar membership type organisation and therefore, an understanding of subscription models.	D
Aptitude	Organised, analytical, logical and numerical.	E
	Ability to meet deadlines.	E
	Strong customer focus.	E
Education	Part qualified accountant (ACCA/CIMA).	E
	AAT qualified.	E
	Finance degree.	E
Personal qualities	Ability to organise own tasks and work to tight deadlines.	E
	Strong interpersonal skills.	E
	Strong attention to detail, accurate and able to work under pressure.	E
	Able to work on own initiative and as part of a team.	E
	Ability to take ownership and responsibility.	E
	Committed to providing a high standard of customer service to stakeholders.	E
	Professional approach to work.	E

Summary terms and conditions

Working hours:	35 hours per week.
Annual leave:	25 days and statutory bank holidays plus two discretionary days for Christmas (office shuts between Christmas and New Year).
Flexi time:	we operate a flexible working system.
Life assurance:	four times annual salary.
Pension:	AAT comply with its obligations and duties under auto-enrolment legislation in accordance with the Pensions Act 2008. The current qualifying arrangement for auto-enrolment purposes is AAT's Group Personal Pension Scheme. If you chose to increase your contribution AAT will contribute up to a maximum of 10.15%. Further details would be given on joining the organisation.
Income protection:	income protection is offered subject to terms of the policy.
Other:	company sick pay scheme season ticket loan after completion of probationary period enhanced maternity, paternity and dependency leave provisions subsidised social events.
Location:	140 Aldersgate St, London, EC1A 4HY
Notes:	this post will be subject to background checks. A full statement of the main terms and conditions of employment will be supplied with any formal offer of employment. The above information may be helpful to applicants as a guide but should not be treated as a substitute for a full contract.

Our vision

To ensure AAT reaches the heart of every business.

To achieve our vision, we will:

- grow – expanding our core membership by increasing recognition, creating demand, and maintaining a strong and valued relationship with members
- innovate – embrace the possibilities of change and development to be ahead of the game
- diversify – attracting people beyond our core membership, with new AAT products and services
- stay financially secure – managing our resources efficiently and effectively and investing wisely to continue to develop and progress.

How to apply

To apply for this hot opportunity please send a CV and covering letter to jobs@aat.org.uk

Closing date: 9 June 2015 – 17:00

HR contact details

t: 020 7397 3000 (answerphone)

e: jobs@aat.org.uk

w: aat.org.uk/careers