

# Australian Retirement Trust

## Position Description



Position title	Finance Business Partner	Business area	Finance and Strategy
Role classification	Group B	Business unit	Commercial Performance & Governance

### Role purpose

As a Finance Business Partner, you will be supporting the Senior Finance Business Partner in the delivery of financial advice and support to several business units. You will drive the monthly analysis on operating performance and trend analysis, including recommendations on improved efficiency, effectiveness and performance. As a trusted finance business partner, you will be responsible for providing advice and support to the business on a range of issues, including business planning and the rolling quarterly forecasting process.

A key deliverable is the delivery of monthly financial information and analysis for management review and monthly P&L report presentations to each of the business units. You will also be part of the team leading the preparation of the annual budget and quarterly forecasts including providing senior management insightful commentary and analysis.

By maintaining a customer focus throughout all services you will create, maintain and enhance the relationships with key stakeholders ensuring that information flows are accurate, and knowledge is gained within the finance area.

### Key accountabilities

Along with the accountabilities listed below, individuals in this role are expected to demonstrate the qualities and behaviours that align with Australian Retirement Trust's values of *courage*, *empathy*, and *excellence*.

- Provide monthly management reporting.
- Understand key business drivers and provide expert financial advice.
- Provide financial analysis support to various business units, and preparation of board level submissions.
- Perform high level analytical and detailed analysis on operating financial performance.
- Provide trend analysis and recommendations for potential risks.
- Provide assistance in the preparation of rolling forecast.



- Review business requirements and make financial recommendation to senior management.
- Preparation and analysis of the annual budget and five-year plan.
- Preparation of quarterly scorecards.
- Elicit and document reporting requirements and contribute to the development of new and improvements to existing processes.
- Mentor and coach more junior team members within the Finance team.
- Perform analysis to recommend efficiencies for process improvements and highlight areas that may impact current practices; ensuring that service delivery is efficient and effective to meet customer and corporate standards.
- Contribute to the efficient and effective functioning of the team and business unit to meet Group objectives. This includes modelling the cultural aspirations, helping team members as required and undertaking other key responsibilities or activities as directed by your Leader.
- Any other duties as directed.

## Knowledge, experience and qualifications

### Essential

- Extensive experience in the monitoring of financial performance and delivery of monthly reporting within tight timeframes, including the production of management reports and board submissions.
- Proven experience preparing financial analysis and board level submissions.
- Excellent problem solving, analytical and process development/improvement skills.
- Proven ability to effectively plan, prioritise and manage multiple and competing activities to meet business expectations.
- Demonstrated experience in coordinating and managing the provision of professional information and advice on corporate accounting to senior finance management/stakeholders.
- Demonstrated experience in ensuring compliance with legislative and regulatory requirements and corporate policies, practices and objectives.
- Experience in assisting with the development of annual budgets, forecasts and statutory financial reporting in large/complex organisations.
- Highly developed communication skills, including the ability to effectively communicate and negotiate in writing and verbally with business and technical personnel.
- Proven experience in contributing to the review and improvement of the monthly management accounting and reporting processes and the associated policies and procedures.
- Strong interpersonal and negotiation skills, with the ability to influence senior leaders.
- Ability to discuss and promote risk management and compliance activities.
- Understanding of superannuation and advice industry.



- Previous experience in a business partnering or advisory role.
- CA/CPA Qualification.
- Degree qualifications in (accounting, business, finance, commerce etc).
- Relevant business analysis/ management accounting experience, minimum 5 years.
- Expert working knowledge of Microsoft Excel.
- Financial control disciplined.
- Cash flow modelling.

**Desirable**

- Experience in business intelligence tools (such as PowerBI) and utilisation and optimisation of these tools for enterprise reporting.