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**ROLE: Regional Finance Manager (North) REPORTS TO: Head of Finance**

**BACKGROUND**

Kingswood is an integrated wealth planning and investment management firm with c£4.8 billion of Assets under Management/Advisory. The company is focussed on the protection and long term growth of client wealth whilst carefully protecting against risk. Founded in 2011 the company is now a team of c170 people across the UK.

Kingswood is an AIM listed company on the London Stock Exchange with many employees holding shares in the firm. The Group’s operating businesses are authorised and regulated by the Financial Conduct Authority and has offices across the UK, Atlanta and New York, USA and with a client base in South Africa.

Kingswood offers a range of financial solutions to clients, ranging from private individuals to some of the UK’s largest universities and institutions, providing investment advice and management, personal and company pensions and wealth planning. Kingswood is focused on becoming a leading player in the wealth management market through targeted acquisitions in the UK and the US, with the ultimate goal of creating a global business.

The firm now needs to hire a talented and ambitious regional finance manager to join its expanding team, help support Kingswood’s growth strategy and build a robust finance platform for the future.

## SUMMARY OF ROLE

This is a critical commercial finance and accounting role within a small finance function in an entrepreneurial, fast changing company. A varied role managing day to day finance functions including revenue management, monthly financial performance and MI. The regional finance manager also plays a critical role supporting both group and regional management in assessing acquisitions.

This role is a key member of the global finance team, helping to shape and implement a world-class finance function to support the growth of the Kingswood group. Most critically, this roles serves as a partner to the Regional Director, providing commercial and financial support in the management and growth of the business.

**RESPONSIBILITIES**

**Key tasks include:**

* Establish an operating framework with corporate finance to ensure that all regional financial transactions are properly recorded and reported
* Monitor and review regional financial performance through the monthly management accounts process and examine all financial reports and data closely to check for discrepancies
* Enhance systems where appropriate to prevent errors in data collection and calculations
* Assist in developing and implementing quality MI across the business
* Develop a regional budgeting process with associated reporting framework
* Contribute to financial strategy including risk mitigation and forecasting
* Review all regional financial plans and budgets regularly to identify variances and report significant issues to management
* Assist the Regional Director and/or CFO in presenting reports to senior executives, stakeholders, and board members
* Supervise, manage and mentor regional finance team staff
* Identification, and adoption of, automated processes where appropriate, and cost savings initiatives
* Provide financial analyses as needed, in particular for capital investments, acquisitions, and contract negotiations
* Lead financial due diligence of regional acquisition targets

**Pre-Requisites:**

* Strong academic background
* Accounting qualification
* Minimum 10 years’ experience, preferably in wealth planning and/or investment management
* Must have worked in a small, entrepreneurial firm with strong growth mandate
* Attention to detail is critical
* Strong communicator, comfortable working under pressure and to tight deadlines
* No job too big or small!

**Summary**

This is a hands-on role in a company going through a significant period of growth and change in terms of ownership, management and profitability. The company is expected to double in size over the coming 12 to 18 months. Strong sense of ownership and pride in work is a pre-requisite, as is a can-do attitude and a positive outlook on life and work.

**To Apply:**

Please send a CV and cover letter to Careers@Kingswood-Group.com