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**ROLE: Group Financial Planning & Analytics Manager Reports to: CFO**

**BACKGROUND**

Kingswood Holdings Limited (trading as Kingswood) is an AIM-listed integrated wealth management group, with more than 16,000 active clients and c. £6 billion of Assets under Advice/Management. It has a growing network of offices across the UK as well as offices in New York, San Diego & Atlanta and a presence in Johannesburg, South Africa. Clients range from private individuals to some of the UK’s largest universities. The Group’s vision is to become a leading global provider of trusted wealth planning and investment management solutions to clients, underpinned by investment in people and innovation in technology to support our advisers and clients.

## SUMMARY OF ROLE

The Group Financial Planning & Analytics Manager will be responsible for providing insightful financial and non-financial information, decision support and financial management, as well as wider business liaising and business partnering with regional and divisional business heads. This role also requires someone with strong technical accounting experience to assist with complex statutory financial statements.

This is an opportunity to join a rapidly growing organisation and fast-paced environment within an expanding Finance team and gain exposure to the wider business.

**Key tasks**

* Responsible for producing consolidated group budgeting and forecasting
* Manage the production of forecasting, budgeting, and analysis for several divisional P&Ls
* Business partnering with and data presentation to senior management – including CEO and COO – and external stakeholders
* Prepare and review monthly management accounts
* Monthly revenue and AUM analysis
* Preparation and review of group VAT returns
* Improvement and automation of processes
* Preparation of group and subsidiary statutory financials
* Manage the audit process and liaise with external personnel on annual and interim audit
* Work closely with Group FC, covering and supporting as necessary
* Extensive ad-hoc projects

**The successful candidate will:**

* Qualified ACA/ACCA/CIMA
* Experience within a FP&A Manager, Senior FP&A role
* Demonstrable experience of process improvements
* Highly competent in Excel
* Strong technical accounting skills
* Understanding of IFRS and UK/US GAAP

Interested candidates should send their CV to Linda.Tottem@Kingswood-group.com