

POSITION DESCRIPTION

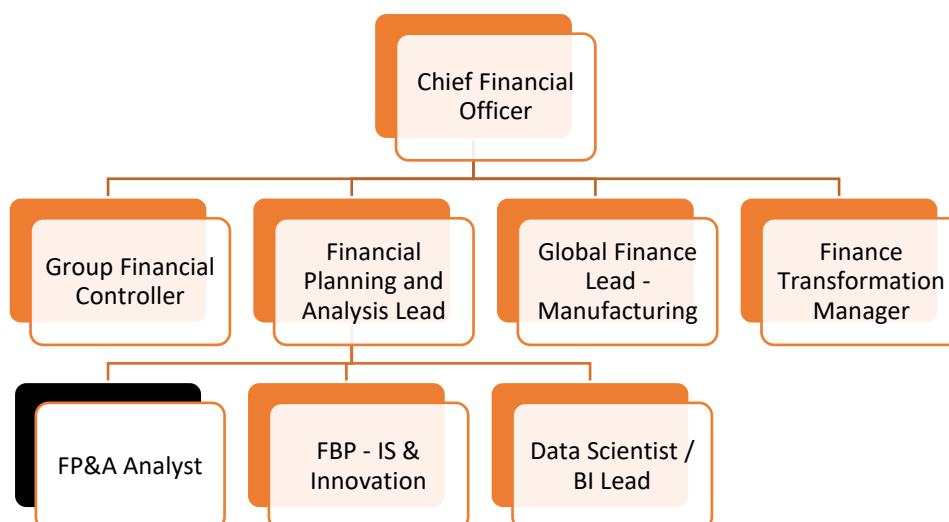
Position Title: Financial Planning and Analysis Analyst	Direct Manager: Financial Planning and Analysis Lead	
Budget Responsibility: Nil	Direct Reports: 0	Indirect Reports: 0

WHAT YOU'RE HERE TO ACHIEVE

Key purpose: Through a deep understanding of the business and performance expectations you will support reporting, insight and challenge to ensure the business develops, agrees and delivers on these strategically aligned and business and financial plans.

Reporting to the Financial Planning and Analysis Lead you will support the Finance leadership team and play a key support role in managing the formation on the business and financial plans and budgeting and forecasting process to provide visibility of business performance to support decision making. You will collaborate with the FP&A Lead in ensuring management reporting is effective and generates insights highlighting key risks and opportunities and associated scenarios and options to drive the right actions and business outcomes.

WHERE YOU'LL FIT IN #TEAMGALLAGHER



WHO YOU'LL BE WORKING WITH

INTERNAL RELATIONSHIPS	EXTERNAL RELATIONSHIPS
ELT, Finance Team, Regional/Key Account Managers, IS Team	As required

WHAT YOU'LL BE DOING

Key Accountability	Outcomes/ Expectations
Budgeting, Forecasting and Planning	<ul style="list-style-type: none"> Assist FP&A Lead and team on the budgeting, forecasting and planning process (& associated systems and tools) across the organisation, incl. managing timelines, calendars and workflow. Work cross-functionally within Finance to ensure inputs and assumptions are aligned and documented in the forecasting model. Support Finance Business Partners and Business Unit heads to build their annual budgets and forecasts to achieve high levels of forecast accuracy Support improvements to agility through implementation of automation in models and supporting workbook to minimize data preparation time
Performance Management Reporting	<ul style="list-style-type: none"> Provide Finance Business Partners with the timely and accurate standardised reporting to agreed specifications to support insights and decision making Consolidate and analyse financial and operational results at the enterprise level to better understand business performance to identify opportunities and risks and enable prioritisation of where interventions are required
Project Reporting & Business Cases	<ul style="list-style-type: none"> Assist on the investment prioritisation, review and approval process for the Group Aid in the creation and development of ad hoc financial models and analysis to a rigorous standard to assist and support strategic initiatives and business cases
Insights and Analytics	<ul style="list-style-type: none"> Assist with the management reporting including periodic performance reports, balance sheet, cashflow reporting, etc, including supporting the improvement of BI reports. Create presentations that provide insightful analysis on business performance identify required action items, and effectively frame decisions to be made Utilise BI tools to uncover and provide insights into business performance
Strategic Initiatives & Process Improvement	<ul style="list-style-type: none"> Ad hoc analysis and projects as required to support the wider Finance team providing on-demand financial analysis and insights as needed to assist with broader finance-related goals or challenges Assist with special projects such as evaluating potential acquisition targets, integration and divestitures.

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| | <ul style="list-style-type: none">• Support initiatives targeted at process improvement and the implementation of changes to achieve efficiencies objectives in the areas of financial reporting and analysis |
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Including any other duties not specified that may be required to complete the role, and as requested by the Financial Planning & Analysis Lead.

HOW YOU'LL BE DOING IT

Qualifications and / or Experience:

- Bachelor or master's level degree (Finance, Economics, Accounting, Business Administration)
- CA, CPA, CIMA or similar qualification
- 5+ years plus previous experience in a financial analyst, business analyst or similar role in a commercial or FP&A team

Skills / Competencies:

- Strong financial acumen with ability to develop financial reports, models and performance metrics
- Positive stakeholder-centric attitude, providing insights and adding value to the business
- Ability to successfully manage multiple competing priorities and attention to detail while maintaining a view of the big picture
- Confident communication and presentation skills
- Strong data manipulation, leveraging your analytical and financial modelling skills

Skills / Competencies Desirable:

- Influencing key business stakeholders through building effective relationships
- Ability to manage and support the improvement projects and initiatives across an organization
- Knowledge and experience with MS Office, SAP, Adaptive Insights and Power BI

Protect what matters most.

Our purpose and our values apply to our extended Gallagher family including our employees, customers, partners and community.

