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# Example of Financial Planning Analyst Job Description

Our innovative and growing company is hiring for a financial planning analyst. If you are looking for an exciting place to work, please take a look at the list of qualifications below.

## Responsibilities for financial planning analyst

* Delivery of monthly cost centre analysis that actively challenges the business
* Develop, track & interpret KPI’s to give a clear understanding of CS performance
* Proactively identify, appraise & recommend business opportunities
* Assist with planning requirements for our White Label business
* Assist with new project business case analysis and post investment appraisals
* Ad hoc analysis as required by the team and business
* Contributing ideas and participating in development projects to enhance our service and generate revenues
* Being involved in spotting, anchoring, introducing and following up on opportunities for complimentary businesses and solutions
* Providing ongoing coaching and training to other professionals in Wealth Management Services
* Delivery of monthly sales reforecast & supporting analysis

## Qualifications for financial planning analyst

* 1 to 3 years of financial planning experience
* Business / Finance related graduate degree or equivalent
* Part qualified CIMA, ACCA or ACA accountant (or equivalent) or finance degree (or equivalent) with exemptions and desire to start study for a finance qualification
* An inquisitive mind & proactive nature
* Work closely with the marketing team to ensure they are working in line with budget and optimising return on investment
* Work closely with merchandising team to evaluate KPIs and support trading decisions