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# Example of Financial Planning Analyst Job Description

Our innovative and growing company is looking to fill the role of financial planning analyst. Thank you in advance for taking a look at the list of responsibilities and qualifications. We look forward to reviewing your resume.

## Responsibilities for financial planning analyst

* Co-ordinate budget phasing process ensuring consistency in approach from a common set of assumptions
* Support the production of the monthly financial forecast providing trend analysis and highlighting future areas for both challenge and opportunity
* Chairing the Joint Forecasting Forum on a weekly basis and help organise and facilitate the monthly ‘Locked Forecast’ Meeting with the Trading Directors and their teams
* Help maintain the Planning Cycle, coordinating with the Planning representatives from both Marketing and B&M
* Scenario modelling, researching and benchmarking as required ,looking identify and present opportunities for business growth and process improvement
* Assisting in the tracking and review of any major commercial initiatives and /or other business improvement opportunities and their effect on the financial forecast
* Add hoc analysis and business support
* Deputise for Head of FP&A when required
* Fully qualified ACA/CIMA is essential
* Delivery focussed with an energetic, flexible attitude

## Qualifications for financial planning analyst

* Strong ability to organize and facilitate cross-departmental meeting
* BS/BA in Finance or Accounting requires, Master's degree preferred
* Knowledge of financial theory, in particular relating to valuation and investment analysis, including familiarity with concepts such as Weighted Average Cost of Capital (WACC), Net Present Value (NPV), Internal Rate of Return (IRR), Payback and Return on Invested Capital (ROIC)
* Good understanding of accounting principles and concepts, including familiarity with financial statements and their inter-relationships
* Effective communication skills, including ability to comfortably present to all levels of management, clearly articulate complex issues and concisely summarize detailed information
* Strong interpersonal skills, with ability to work well in teams and interact and cooperate with multiple groups/functions