Downloaded from <https://www.velvetjobs.com/job-descriptions/financial-planning-associate>

# Example of Financial Planning Associate Job Description

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

## Responsibilities for financial planning associate

* Participation in discussions and provide input surrounding business intelligence for the functions supported
* Prepares, analyzes and interprets financial forecasts for utilization by management in the decision making process
* Coordinates the monthly/quarterly forecast process, annual operating plan and strategic Plans
* Motivates cross-functional teams by defining responsibilities, providing direction, and fostering a team environment
* Prepares detailed financial models to support Marketing and Research leaders with decision making process associated with new product launches and marketing initiatives
* Prepare monthly project and cost center financial reports and provide analysis relative to plan
* Develop and coordinate annual financial budgets for the organization in partnership with project team leaders and department heads
* Work closely with the CFO to prepare financial analysis for the Executive Committee and Board of Directors
* Represent the finance function on clinical working teams to analyze clinical trial costs
* Work closely with the Commercial department to develop eNPV analysis for pre-clinical and clinical candidates

## Qualifications for financial planning associate

* Relevant PQE experience covering the above duties
* Strong knowledge of financial accounting and controls
* Advanced Microsoft Excel and Power Point skills essential
* Experience in a group function would be beneficial
* A minimum of 5 – 7 years’ experience in accounting and finance
* Strong understanding of accrual accounting as it relates to drug development and clinical operations