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# Example of Senior Financial Planning Job Description

Our growing company is hiring for a senior financial planning. Please review the list of responsibilities and qualifications. While this is our ideal list, we will consider candidates that do not necessarily have all of the qualifications, but have sufficient experience and talent.

## Responsibilities for senior financial planning

* Participating in the evaluation and review of major capital investments
* Support the system upgrade project for the forecasting tool ‘SMART’ partner with IT project leads to provide business user feedback and perform testing
* Manage corporate wide projects such as cash flow modeling, long-term strategic plan models, or cost cutting initiatives
* Actively involved with consolidating, analyzing, and synthesizing large amount of complex financial and non-financial information from numerous suppliers from Chief Accountants Office (CAO) and other stakeholders across Investment Division to compile high-quality and insightful monthly and quarterly reports
* Prepare high-quality monthly and quarterly report, dashboards and presentations to the business unit and division CFOs and the Investment Division Executive Committee (IDEC), and ultimately Group Finance and MFC Executive Committee (EC), enabling meaningful discussion of business results, financial outlook and supporting informed decision-making
* For each reporting & plan cycle, analyze operating performance of home and affiliate offices to evaluate business risks & opportunities
* Prepare management reports (green books and blue books) for WBCP operations
* Update and prepare revenue and expense templates for each planning cycle
* Proactively participate in budgets’ and forecasts preparation for respective function within the company, review targets with business objectives by financial analysis to support management's decision-making process
* Supports annual budget development, long-term Business Development Plan (BDP) activities, quarterly Management Discussion Meeting (MDM) and Latest Estimate (LE) analysis and reporting for the Business unit

## Qualifications for senior financial planning

* 5-7 years of financial reporting experience in forecasting, Budgeting and Variance Analysis
* Familiarity with Business Intelligence Tools –OBIEE, Hyperion, Cognos, ENCORE, RADAR, would be an asset
* Experience with working with ERP
* Excellent analytical skills to interpret and relate financial data so that the resulting comments describe the key risks and drivers
* Captive/Multinational experience (pre-requisite), adaptable to varying cultures
* Strong analytical and financial reporting skills to understand forecast vs