



Finance Business Partner

Department:	Finance
Reports to:	Head of FP&A
Job Family:	Group Services
Career Family / Job Capsule:	Professional / Specialist
Key dimensions:	Salary DOE
Direct Reports	None
Committee/Board membership(s)	None
Approved Senior Manager Function(s), Prescribed or Other Overall Responsibilities and/or any Certification Function(s)	<p>Please tick one of the following (this is mandatory)*:</p> <ul style="list-style-type: none"> - Standard role <input checked="" type="checkbox"/> - Certified Function(s) role <input type="checkbox"/> - Senior Management Function(s) role <input type="checkbox"/> <p>*If you are unsure what category to choose, please email Risk & Compliance at senior.managers&certificationregime@onefamily.com</p> <p>In addition, please attach the Statement of Responsibilities if the role is a Certified Function(s) role or a Senior Management Function(s) role.</p>
Purpose of the role:	<p>Provides business decision support to the business through both regular processes and adhoc analysis, communicating relevant insight in a clear and transparent way</p> <p>Support the evaluation of new opportunities for the business</p>

**Key accountabilities:**

- Lead on the production of strategic and operational performance MI, including insightful commentary, for use across the business, including Board, linking performance data to capital generation (profitability). Ensure information is relevant, reliable and received in a timely manner
- Lead and co-ordinate performance meetings, for example regular Trading Meetings, ensuring MI is continuously reviewed and updated to assess performance
- Partner with key stakeholders, providing insight to support the successful management of the organization and provide financial support to produce business cases
- Work alongside actuarial, pricing and data teams to ensure the impact of change on capital generation is fully understood and correctly reflected in the operational MI
- Ensure integrity and understanding of data in finance systems, being an SME on development changes where required
- Continuous assessment of work process to identify areas for effectiveness and process improvements. Challenge the status quo and look to increase their understanding and knowledge
- Collaborating with the Planning Manager on the Annual plan process, providing insight on performance and partnering with the business to ensure engagement and ownership of the plan assumptions
- Work collaboratively with the CFO, FP&A team, and other Finance teams to ensure they can achieve theirs, and overall Finance team, objectives
- Coach, develop and supervise more junior members within the team

Skills / Experience / Knowledge:

- Professional accountancy qualification e.g. CIMA, ACCA, ACA
- Commercial mindset to be able to prioritise own and team workloads able to react quickly and flexibly
- Strong relationship and stakeholder management skills and experience
- Analytical and creative thinker with a proven ability in translating financial strategy to delivery
- Strong IT skills. Advanced Excel, Exposure to Power BI and other data analytical software. Ability to produce high quality, relevant reports accurately and within deadlines
- Good communication skills, written and oral
- Self-motivated, adaptable with a positive approach. Able to prioritise workloads to react quickly and flexibly



<p>Values</p>	<p>Define who we are as OneFamily. They come from the beliefs we hold, the way we behave and how we want to work together for our customers. For OneFamily this means:</p> <ul style="list-style-type: none"> • Principled • Courageous • Effective <p>Our values are unique to our brand. They give us purpose and focus. They are vital in helping us all 'do the right thing'. If we are confident that we are true to our values, then we can be sure that we are doing the best for our customers.</p>
<p>Adaptability</p>	<p>This job description is intended to provide a broad outline of the main responsibilities only. The post holder is required to be flexible in developing their role in agreement with their Line Manager. In addition, they may be required to carry out any other duties deemed appropriate within the role and expertise.</p>
<p>Performance Management</p>	<p>All employees have a responsibility to participate in regular one to ones with their manager and to identify performance standards of the post. As part of the performance management process every employee is responsible for participating in identifying their own training and development needs to meet the requirements of their role.</p>
<p>Health and Safety</p>	<p>Employees must be aware of the responsibilities placed on them under Health and Safety at Work Act 1974 and take reasonable care for the health and safety of themselves and of other people who may be affected by their acts or omissions at work.</p>
<p>Equality and Diversity</p>	<p>The Society is committed to building an environment where the diversity of its employees is valued, respected and seen as an asset to enabling delivery of the best possible service to our customers and colleagues. It is unlawful to discriminate directly or indirectly in recruitment or employment because of any of the nine 'protected characteristics' contained in the Equality Act 2010. These are age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex, and sexual orientation. Failure to comply with organisational policies on equality and diversity may result in disciplinary action.</p>
<p>Confidentiality</p>	<p>The unauthorised use or disclosure of customer or other personal information is regarded as gross misconduct and will be subject to disciplinary procedures, and could result in a prosecution for an offence or action for civil damages under the General Data Protection Regulations. (GDPR).</p>



Regulatory

- To comply, at all times, with all regulatory, statutory and legislative requirements so far as they relate to the role
- To abide by the Rules of the Society at all times
- To understand and comply with all Group Governance Policies, as appropriate to the role
- To deliver all apportioned accountabilities and responsibilities

Individual Conduct Rules

Rule 1	You must act with integrity
Rule 2	You must act with due skill, care and diligence.
Rule 3	You must be open and cooperative with the FCA, the PRA and other regulators.
Rule 4	You must pay due regard to the interests of customers and treat them fairly.
Rule 5	You must observe proper standards of market conduct.
Rule 6	You must act to deliver good outcomes for retail customers.

Senior Conduct Rules: Applicable to Senior Management Function(s) roles only

SC1	You must take reasonable steps to ensure that the business of the firm for which you are responsible is controlled effectively
SC2	You must take reasonable steps to ensure that the business of the <i>firm</i> for which you are responsible complies with the relevant requirements and standards of the regulatory system.
SC3	You must take reasonable steps to ensure that any delegation of your responsibilities is to an appropriate person and that you oversee the discharge of the delegated responsibility effectively.
SC4	You must disclose appropriately any information of which the <i>FCA</i> or <i>PRA</i> would reasonably expect notice.

Declaration

I confirm I have read and understood the content of this Job Description and I accept the content as an accurate description of the role I am required to perform.

Job holders full name:



Job holders signature:	
Date:	

Version Control:

Amendment Summary	Date	Reviewer
Updated to be aligned with the requirements under SMCR.	24 October 2019	Lawrence Quirk
Updated to accommodate solo regulated SMCR requirements	16 December 2019	Julie Cogger
Updated to include new Rule 6 Conduct Rule.	9 Feb 2023	Lawrence Quirk
Updated to amalgamate the standard, CF & SMF job description template and new values	3 April 2024	Heather Duckett