

Financial Planning & Analysis Manager (Fundraising, Brand and International)



Too many older people have no one to turn to for support. We believe no older person should have to struggle alone. We're Age UK, the UK's leading charity for older people. We provide information, support, friendship and advice when it's needed most. Our services are a lifeline – could you help us reach even more people who need us?

The job, in a nutshell

As the Finance Planning and Analysis Manager (Fundraising, Brand and International) for Age UK, you will play a pivotal role in ensuring effective financial management, strategic planning, and informed decision-making, delivering business intelligence to the senior executive team and budget holders. Your expertise in financial analysis and planning will help drive the organization's mission to maximize the impact of our charitable initiatives and deliver our strategy. This role offers a unique opportunity to contribute to our vision to improve the lives of older people by managing the financial health and sustainability of our fundraising, brand and international operations.

What you'll do for us:

- **Financial Planning:** Develop and maintain comprehensive financial plans and budgets in alignment with the organization's strategic objectives. Collaborate with department heads to gather data, analyze financial trends, and support the preparation of annual budgets and long-term financial forecasts.



'I have worked in the finance team for over 5 years now and I've really enjoyed the journey so far. Everyone at Age UK is very friendly and supportive. I have learnt so much over the last five years, I look forward to the next five.'

Chai Dev
SENIOR FINANCIAL
ACCOUNTANT

Our values

- Collaborative
- Impactful
- Ambitious
- Inclusive

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- **Financial Analysis:** Conduct in-depth financial analysis to monitor and assess performance across multiple programs and projects. Identify key financial drivers and opportunities for cost optimization. Provide business intelligence, insights and recommendations to senior management to enable informed decision-making.
- **Financial Modelling:** Prepare and maintain financial models and analysis supporting development and evaluation of bids and proposals to our funders, and return on investment. Financial advice and support for submission of income claims. Preparation of financial reporting back to funders, to meet contractual reporting requirements.
- **Reporting and Metrics:** Prepare accurate and timely financial reports, including monthly, quarterly, and annual management accounts. Create dashboards and key performance indicators (KPIs) to monitor financial performance, track progress against targets, and provide meaningful insights to stakeholders.
- **Variance Analysis:** Regularly perform variance analysis to identify discrepancies between budgeted and actual results. Collaborate with relevant stakeholders to understand underlying reasons and take appropriate corrective actions if necessary.
- **Financial Strategy:** Work closely with the executive team to develop and refine financial strategies that align with the organization's mission and objectives. Offer expert financial advice to guide decision-making on investments, fundraising initiatives, and resource allocation.
- **Risk Management:** Assess financial risks and develop risk mitigation strategies. Collaborate with the Risk Management team to ensure proper financial controls and compliance with relevant regulations and best practices.
- **Budgetary Control:** Monitor income and spending against approved budgets, ensuring optimisation of return on investment, and adherence to financial guidelines, supporting budget holders to deliver income and manage spend to deliver the strategy within budgetary constraints.
- **Team Leadership:** Oversee and mentor a team of two. Foster a collaborative and supportive work environment, promoting professional development and continuous improvement.

Location

Hybrid - (Home/London)

People management

Yes

Division

Group Finance
(Finance, D&T, Strategy)



ageuk.org.uk

Age UK, 7th Floor, One America Square, 17 Crosswall, London EC3N 2LB.
Registered charity number 1128267. Company number 6825798.

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- **Stakeholder Engagement:** Collaborate with various departments and external stakeholders to provide financial insights, support funding proposals, and establish strong working relationships.
- **Continuous Improvement:** Identify opportunities to enhance financial planning and analysis processes, tools, and systems to drive efficiency and accuracy within the finance department.

Must haves:

- Proven experience in financial planning, analysis, and budgeting, preferably within the nonprofit or charity sector.
- Strong analytical skills with the ability to interpret complex financial data and generate actionable insights.
- Proficiency in financial modeling, forecasting, and scenario analysis.
- Comprehensive knowledge of financial reporting standards and best practices.
- Excellent leadership and team management abilities, fostering a collaborative and high-performing team culture.
- Outstanding communication and presentation skills, capable of effectively conveying financial information to diverse audiences.
- Excellent organisational skills and ability to juggle multiple pieces of work simultaneously, delivering to deadlines whilst managing expectations across multiple stakeholders.
- Knowledge and proven experience working with financial accounting packages and corporate reporting systems. Power BI and Navision experience advantageous but not essential.
- A passion for the mission and values of the Age UK, combined with a desire to contribute to positive social impact.

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