welcare
strengthening families since 1894

PERSON SPECIFICATION – FINANCE

Role: **Trustee with financial expertise**
Location: **South London and East Surrey**

We are seeking a Trustee with financial experience and/or financial qualifications to support the Board in providing effective governance, strategic oversight and financial assurance. The successful candidate will bring the ability to interpret financial information, assess the financial implications of proposals and provide clear, sound advice to support informed Board decisions.

Essential knowledge, skills and experience

- Financial experience and/or financial qualifications, with the ability to draw on this knowledge to contribute to Board discussions and provide effective financial scrutiny.
- Some experience of charity finance and fundraising, with an understanding of how financial planning supports the delivery of charitable services.
- The ability to analyse and interpret fairly complex financial data, identify significant issues and explain their implications for the charity.
- Experience in budget-setting and monitoring, with the ability to scrutinise budgets, examine variances and ask informed questions about financial performance.
- The ability to analyse proposals and examine their financial consequences, considering the risks, opportunities and implications for the charity's resources.
- The ability to exercise independent judgement, constructively challenge assumptions and ask probing questions on financial matters.
- The ability to present financial information clearly and make it understandable for trustees and others without a finance background.
- A willingness to be approachable and respond to financial enquiries from trustees and staff, supporting their understanding of financial matters.
- The ability and willingness to support the executive team when liaising with auditors, accountants and other finance professionals
- The ability to make recommendations to the Trustee Board based on sound financial advice, explaining the reasoning and financial implications clearly.
- The ability to contribute financial expertise at Board level, supporting collective decision-making and effective oversight of the charity's finances.
- Some knowledge of pension schemes and investments, to inform Board discussions and scrutiny of related financial proposals.