



## AmTrust International – Role Profile/Job Description

1	Job Title	Financial Planning & Forecasting Analyst
2	Function & Business Unit	Financial Planning & Forecasting – Finance
3	Location	London
4	Direct & Indirect Reporting Line	<u>Direct Line Manager</u> Head of Financial Planning & Forecasting  <u>Indirect (dotted) Line Manager</u> None
5	Direct & Indirect Reports	<u>Direct Reports</u> None  <u>Indirect (dotted) Reports</u> None
6	Committee Roles	<u>Chair</u> None  <u>Member</u> None
7	Key Stakeholders	Entity CFOs and Finance Teams Capital Management Group Financial Reporting Finance Business Partners
8	Applicable Conduct Rules	Individual Conduct Rules 1. You must act with integrity. 2. You must act with due skill, care and diligence. 3. You must be open and cooperative with the FCA, the PRA and other regulators. 4. You must pay due regard to the interests of customers and treat them fairly. 5. You must observe proper standards of market conduct. 6. You must act to deliver good outcomes for retail customers.
9	Date Reviewed & Agreed by Line Manager & Post holder	

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## Position Overview

The **Financial Planning & Forecasting Analyst** role sits within the International Finance Department. The role's primary focus being on;

- Annual Business Plan and Quarterly Forecast processes for AmTrust International;
- Delivery of Forecast and Scenario outputs / analyses to key stakeholders to drive business decisions.

## Essential Job Functions

- Support the end-to-end annual business plan and quarterly forecasting process, including development of robust process documentation and control, timetabling and management (upstream, downstream) of key stakeholders;
- Contribute to the development and maintenance of the International Financial Forecast Model and related processes to ensure inputs are accurate and relevant, production of consistent, timely and reliable financial forecasts (and related scenarios as required) for capital management, ultimate Board and Regulatory requirements;
- Develop and oversee processes to ensure that data captured will enable a detailed analysis of the business drivers associated with the business unit, products, markets covered to meet the requirements as stated above;
- Responsibility for ensuring all assumptions and outputs are documented for review and internal controls purposes;
- Improving the automation and accuracy of the above processes, within Excel or ultimately in source systems where appropriate;
- Support the production of regular management reports, Board reports and associated analysis as part of the FP&A processes;
- Support the delivery of wider Finance initiatives and ad hoc project work as required. Ensure you complete all mandatory and job specific training requirements in line with the required time frames.
- Complete the required number of hours of Continuing Professional Development (CPD) as it pertains to your role and applicable qualifications and ensure this is logged in Workday.
- Fully participate in all applicable fitness and proprietary and Performance Review processes. Promptly advise your line manager/HR as to any matter that may be relevant and/or impact your ability to perform in your role.
- Other duties may be assigned in order to meet the on-going needs of the organisation

## Qualifications, Experience, Competence

### Qualifications

- Professional Membership
  - ACA / CIMA / ACCA or equivalent

### Experience

- 4+ years' post qualified experience in the insurance industry
- Business planning / forecast roles, in FP&A or similar;
- Experience in, or working with, capital and / or reserving teams.

### Functional/Technical Competencies

- Understanding of insurance and underwriting result drivers;

- Strong Excel and data manipulation skills (using Power Query, VBA or otherwise highly desirable).
- The ability to navigate vast quantities of complex data, with control and to distil into information relevant for key stakeholder decisions;
- Business modelling and analytical skills;
- Working with complex financial models;
- Demonstrable organisational and project management skills;

### **Core AmTrust Behavioural & Professional Competencies (Employees)**

**Results Driven:** Displays energy, determination and a sense of urgency to get the job done; understands the importance of meeting deadlines to achieve objectives; takes responsibility for organising own workload to ensure goals are met; identifies barriers or issues that might impact adversely on getting the job done and is proactive and innovative in resolving problems and finding solutions; strives for excellence.

**Adaptable & Open to Change:** Demonstrates a willingness to adapt and change according to circumstances; is able to comfortably handle ambiguity and changes in priorities; identifies the requirement to demonstrate flexibility for the wider benefit of the department and the business; supports change and the drive to continuously improve.

**Relationship Management & Customer Focus:** Builds and maintains strong internal and external customer and other relationships as relevant to role; is able to effectively understand and support customer needs while balancing business needs; takes responsibility for meeting agreed service levels and other commitments.; strives to deliver excellence and innovates to deliver solutions; ensures that everything that they do complies with all Treating Customers Fairly (TCF) principles.

**Risk Management:** Is able to understand and identify common types of business risks for their functional or business area; actively supports the maintenance of an effective control environment; takes timely remedial action as may be required to prevent or minimise loss; proactively escalates risks to the appropriate party; supports continuous improvement in the management of risk.

**Collaboration:** Demonstrates respect and integrity in all collaboration with others; works with rather than competes with others in the business to achieve company goals; builds trust through open communication; adapts style and messaging appropriately; seeks out and listens to the opinions of others; supports team building and an inclusive culture that values diversity.

**Continuing Professional Development:** Proactively keeps up to date with regulatory and professional changes; maintains the required knowledge and skills to perform in post and undertakes all required / mandatory training; ensures that annual learning and development plans and Continuing Professional Development (CPD) obligations are achieved.

**AmTrust Values:** Able to demonstrate and role model AmTrust's values: Excellence, Innovation, Integrity, Responsibility, Inclusion and Teamwork.