Job Description



JOB TITLE: Financial Planning Analyst

GRADE: 4

REPORTING TO: Business Planning Manager

LOCATION: London

# **ABOUT US:**

ERS is the UK's largest specialist motor insurer with an A+ rating. Through Lloyd’s Syndicate 218 we work exclusively with motor insurance brokers to help get under the skin of the most difficult insurance risks, helping build products to meet their customer’s needs.

ERS recently announced the backing of Arcus, Lloyd’s syndicate 1856, giving the firm the ability to write Specialty, Commercial and Reinsurance lines alongside the existing motor business within Syndicate 218.

**THE ROLE:**

Supporting the Business Planning Manager and to take increasing ownership of the business wide financial planning, forecasting and analysis activities of the Syndicate.

**KEY RESPONSIBILITIES:**

* Work with Finance Systems and other teams to develop an automated business planning process
* Preparation of the quarterly reforecasts, Lloyd’s SBF and annual business plans – both YoA and CY
* Preparation of Board and Executive papers with supporting narrative – qualitative and quantitative
* Own and continually develop the financial planning model based on business requirements
* Cross business liaison to capture model inputs – reserving, underwriting, finance and expenses
* Analyse AvEs to understand drivers of deviations, trends, and areas of opportunity or remedial action
* Identification and analysis of any process simplification and improvement opportunities
* Act as key Finance point of contact for all business planning related activities
* Provide leadership, direction and support to others within the team

*The above duties and responsibilities are not an exhaustive list and you may be required to undertake any other reasonable duties compatible with your experience and competencies. This description may be varied from time to time to reflect changing business requirements.*

**ESSENTIAL QUALIFICATIONS, SKILLS & EXPERIENCE**

* A part qualified and commercially minded financial accountant – CA/ACA/CIMA/ACCA
* Strong knowledge of Insurance accounting, UK GAAP and finance systems – essential
* Understanding of Lloyd’s regulatory/syndicate accounting requirements
* Intermediate/Advanced Microsoft Excel skills – TM1 experience highly advantageous
* Extremely proficient in use of Microsoft Office product suite and general PC skills
* Ability to manage own workload and work to strict deadlines
* Effective organisational and time management skills with the ability to work under pressure
* Strong analytical skills and an inquisitive mindset
* Highly organized and methodical thinker

**DESIRABLE BEHAVIOURAL ATTRIBUTES**

* **Effective Communication skills** – Candidate can express themselves clearly and effectively when communicating, includes, written, verbal and listening forms of communication.
* **Initiative and Change** – Self-starter who takes action without being prompted. Able to react to change and use initiative to identify areas where change is necessary.
* **Driving and Delivering Results** – Motivation to complete work and deliver the desired outcome in line with job requirements and timescales
* **Problem Solving** – Defines problems clearly and logically, effectively using an appropriate problem solving and decision-making style to address situations. Communicates the problem and solution appropriately.
* **Decision Making** – Effectiveness and ability to make decisions to achieve goals, and drive these to successful completion
* **Teamwork** – Able to work collaboratively with others in a participative environment, using appropriate interpersonal and communication skills to promote team effectiveness.
* **Commercial and Financial Awareness** – Has an awareness of internal and external commercial and financial markets and the financial and commercial impact their decisions may have on the success of their department.
* **Personal Growth and Self-Management** –Establishing effective personal goals and standards for future growth and development
* **Building Relationships** – Developing good relationships, gets along with all levels of staff and executive, putting them at ease.

Name (PRINT): .…………………………………………………………………

Signature: …………………………………………………………………………

Date: …………………………………………………………………………………