



Finance Business Partner

Role Information Pack
November 2024

Contents

Welcome	3
The Organisation (CIOT/ATT)	4
Role description	5
Key accountabilities	6
Skills needed to fulfill the role	7
Salary & benefits package	8
Guidance notes for applicants	9



Welcome

Thank you for showing an interest in the Finance Business Partner role. The CIOT and ATT are educational charities and the leading professional bodies in the UK for tax advisers dealing with all aspects of taxation. If successful, you will be joining a dedicated team of staff and volunteers who ensure that we continue to meet our primary purpose of promoting education in taxation. Our key aim is to achieve a more efficient and less complex tax system for all, and you will see from our annual reports that we do this through a wide range of activities.

At the CIOT and ATT our vision is: to remain the leading bodies for taxation professionals in the United Kingdom, serving the public interest through the pursuit of excellence and with integrity, and we're looking for people who are excited about joining us on our journey. To help us achieve our vision we're looking for exceptional people who live our values and behaviours and who can inspire others; embrace change; deliver results and keep it simple.

Ethical - we promote the highest professional standards

Collaborative - we work together to achieve the best results

Inclusive - we support and respect all people, embracing diversity

Empowering - we encourage leadership, initiative, and innovation

Progressive - we continuously drive improvement, leading to real change

Committed - we deliver high quality, good value services

We know that an inclusive environment makes us more accessible and ensures we attract, engage, promote, and retain exceptional people. We welcome applications from all individuals regardless of age, gender/gender identity, sexual orientation, ethnicity/nationality, disability, or military service and welcome those who have taken career breaks. We will consider flexible working arrangements or home working arrangements for any of our roles and offer workplace accommodations to ensure you have what you need to effectively deliver in your role.

We're an organisation which was founded by ordinary people who were dedicated to making tax as simple as possible for the public and providing qualifications that are open to all. Our members and volunteers come together to help each other get the most from their Professional Bodies and enhance their future careers. If you come to work here at the ATT and CIOT, you'll be part of that. Part of something a bit different. And something really quite special.

What's more, we have a strong ethic of care for each other and our members. We recognise that our employees feel most appreciated when their thoughts and values are respected and considered. We're committed to creating a culture that recognises and truly values our individual differences and identities. So, if you'd like to be a part of an inclusive workplace where you can be yourself, where your talents are nurtured, and you feel empowered to contribute, then please apply.

Jane Ashton

ATT CEO



Helen Whiteman

Chief Executive, CIOT



About the CIOT and ATT

The CIOT is the leading body in the UK for taxation professionals dealing with all aspects of taxation. Our primary purpose is to promote education in taxation. One of our key aims is to achieve a more efficient and less complex tax system for all. Our comments and recommendations on tax issues are made solely in order to achieve this aim; we are an entirely apolitical organisation. Membership of the CIOT is by examination, nationally recognised as the gold standard of UK taxation education. We support our 20,000 members and 5,000 students throughout their tax careers, providing assistance through our London-based head office and network of 35 branches. The CIOT is a registered charity, number 1037771, a chartered corporation and a regulatory body for the purposes of Anti-Money Laundering supervision of tax practitioners.

The CIOT is a member of the Confédération Fiscale Européenne (CFE) and is registered under the European Commission's Transparency register, number 91596579174-61. The CIOT is managed by its chief executive and directors, under the strategic guidance of the Council. The CIOT is a Chartered corporation established under Royal Charter. Its governing documents comprise the Charter, Byelaws, Member Regulations and Council Regulations. The CIOT does not raise funds through asking for public donations in any form.

The primary charitable objective of the ATT is to promote education and the study of tax administration and practice. One of our key aims is to provide an appropriate qualification for individuals who undertake tax compliance work. Drawing on our members' practical experience and knowledge, we contribute to consultations on the development of the UK tax system and seek to ensure that, for the general public, it is workable and as fair as possible. Our members are qualified by examination and practical experience. They commit to the highest standards of professional conduct and ensure that their tax knowledge is constantly kept up to date. Members may be found in private practice, commerce and industry, government and academia.



Role description

Job Purpose

Providing management reporting, financial planning and variance and movement analysis to budget holders. Working with senior decision makers and budget holders to ensure that their department and directorates have robust financial information to support effective decision making. Producing and presenting monthly reporting packs to budget holders and senior decision makers, ensuring the reporting packs provide insight into the operational drivers of the financial results.

Support the Chief Finance Officer, with dotted line accountability to the Financial Controller, in their decision making and reporting to the governance structure by producing financial analysis.

Providing a business partnering service and financial reporting to the branches, supported by the ATT and Branches Accounts Assistant. The role will also be responsible for the line management and professional development of the ATT and Branches Accounts Assistant.

Operating Environment

Working directly to the Chief Finance Officer and liaising directly with budget holders, directors and the two Chief Executive Officer at CIOT and ATT, the purpose of the role is reporting the financial position, produce financial planning, support budget holders with financial Management and provide the Chief Finance Officer with bespoke financial analysis and modelling.

The Chartered Institute of Taxation ('CIOT') and the Association of Taxation Technicians ('ATT') form between them, a worldwide tax family of over 35,000 tax students and professionals.

The CIOT is the leading professional body for taxation professionals in the UK. A registered charity, with the primary purpose of promoting education in, and the study of, the administration and practice of taxation, it has over 20,000 members (titled as Chartered Tax Advisers ('CTAs')). It operates on an apolitical basis designed to achieve, amongst other things, a better and more efficient tax system for all involved. This includes the public, taxpayers, advisers and relevant statutory authorities. It is also internationally active, especially in Europe, through the ADIT qualification.

Founded in 1989, the ATT is a charity and the leading professional body for those providing UK tax compliance services. The primary objective of the Association is to promote education and the study of the administration and practice of taxation for the public benefit. One of the key aims is to provide an appropriate qualification for individuals who undertake tax compliance work. Those who meet the membership requirements have their qualification recognized by use of the title of 'Taxation Technician' and the designatory letters 'ATT'.

Framework & Boundaries

The Finance Business Partner helps with the organisation plan and looks forward by providing analysis on cost and income in order to make decisions for the growth and benefit of both Charities. The Finance Business Partner is required to build strong relationships with budget holders and senior decision makers to ensure they can fully understand and report on the operational reasons for variances to the budget and forecast movements. Further to this, the Finance Business Partner will be required to both support and challenge budget holders and senior decision makers to ensure financial projections are accurate.



Key accountabilities

- Manage the deferred revenue schedule ensuring all deferred income is recorded and released accurately for CIOT and ATT.
- Reviewing monthly salaries, owning the salary cost master sheet recording all new headcount/ leavers analysis against budget and update the forecast.
- Preparing and posting the monthly payroll journals and corporate credit card expenses.
- Responsible for leading finance reviews with budget holders providing key management reporting and ensuring the financial results are challenged to ensure accuracy and are fully understood.
- Producing a consolidated monthly reporting back for both CIOT and ATT. Presenting these at the finance review with the Chief Finance Officer and Financial Controller.
- Presentation of the financial results to both the Chief Executive Officers at CIOT and ATT.
- Producing the departmental accounts for all budget holders providing key commentary on both monthly and YTD variances and movements from forecast.
- Producing bespoke financial analysis for the Chief Finance Officer as and when required, to include financial modelling to support business cases for future strategic direction.
- Supporting departmental budget holders to develop appropriate pricing models to ensure income delivers the appropriate level of contribution to cover organisational overheads.
- Lead the annual budget process, including design of templates, organising and running budget holder meetings, consolidating the organisational position for both CIOT and ATT, presenting the consolidation to the Chief Finance Officer and Financial Controller providing justification for movements from the half year forecast.
- Work with budget holders and senior decision makers to produce a Q1, Q2 and Q3 forecast and provide the Chief Finance Officer and Financial Controller with analysis on the movement from the budget or the previous forecast.
- Be the financial lead and business partner for the CIOT Branch Network, providing monthly financial statements that represent timely and accurate information. Attending branch meetings when required, responding to branch treasurer's queries and holding regular meetings with the Head of Membership and Branches.
- During Annual and Interim Audit, be the lead on the income schedules preparing all income Analysis to be sent directly to Auditors.
- Be the key face of finance to Heads of Departments, providing them with a critical friendship by offering advice and guidance when required and bringing challenge to financial discussions.
- Cover the Senior Financial Accountant during absence and holiday.
- Deputize for the Financial Controller during absence.

Potential Job Impact

The Finance Business Partner will provide the business and volunteer branch network with timely and accurate management information and an excellent business partnering service. Management information will be made available within the 10-day timetable and will provide stakeholders with clarity on the operational drivers behind the financial results. Annually the Finance Business Partner will lead the production of the annual budget and present the consolidated budgets for CIOT and ATT to the Chief Finance Officer and the Financial Controller in the required timeframe to ensure governance reporting deadlines are achieved.

Skills needed to fulfil the role

Knowledge and experience

- Qualified Accountant (CIMA or ACCA) 1-2 PQE
- Management of people experience
- Experience in preparing and understanding budgets and forecast
- Commercial knowledge and awareness

Functional/technical skills

- Advanced Excel application including ability to use formulae to analyze large data sets
- Excellent communication skills and good at building relationship
- Excellent presentation skills
- Good writing skills and ability to communicate to senior management
- Excellent attention to details

Interpersonal and work management Skills

- Able to communicate in clear and concise manner
- Excellent communication skills explain Finances to non- financial managers
- Able to understand and articulate the operational story that drives financial results
- Hands on and Self Starter who is able to set and manage their own priorities
- Flexible and positive approach to work
- Team Player

Salary & Benefits

package

Salary

The salary for this role is £63,000 per annum, 35 hours per week (remote) with travel to the office as required.

Pension

You will be automatically enrolled into the Aviva Group Pension Plan (9% employer and 3% employee contribution) upon joining.

Insurance

- Income protection cover which provides up to 75% of salary if you are absent due to ill health for more than 13 weeks.
- 24-hour group personal accident scheme providing a sum equal to three times current salary in the event of your permanent disability/ loss of a limb/ death.
- Non-contributory life assurance cover of 4 times your salary.

Holiday entitlement

The organisation offers a generous holiday entitlement from 22 - 27 days depending on your length of service.

Optional Benefits

Bupa (private medical insurance)

You can join our company-paid private medical insurance scheme which pays for the cost of private medical treatment for acute conditions.

Healthshield Essentials (including Employee Assistance Programme)

You can join our health & benefit programme. We pay the cost for the basic level (including any dependent children). The benefits include the refund of a range of medical costs (dental, optical, physiotherapy etc) and an employee helpline covering medical and legal issues and counselling.

Interest Free Loans

After 6 months service you may apply for an interest free loan to help with the purchase of a season ticket or a bicycle.

Continuous Professional Development

The Chartered Institute of Taxation requires all professional employees to maintain their CPD activities and offers an exciting range of learning opportunities through its branch and conference programmes.



Guidance notes for applicants

Thank you for considering working with us. These notes are designed to help you through our application process. However, if you have any questions regarding the process that are not covered here, please do not hesitate to contact Kurt at kurt@cyresourcing.com for advice.

The deadline for applications is 16 December 2024 by 5pm.

You can apply by submitting a covering letter and up to date CV via email to Kurt, as per the email address provided above. Your covering letter should make it clear how your skills and experience match those described in the advert or job description.

If you wish to find out more about the role before applying you may do so by emailing Kurt, or by calling him on 07531140479. This will not prejudice your application in any way.

If you do not hear from us within 2 weeks of applying this means that you have not been shortlisted on this occasion. Failure to be shortlisted for one role does not bar you from applying for others when they are advertised. This post will be resourced through a two- stage interview process. HR Screening will be w/c 6 January 2025 with the panel interview w/c 13 January 2025.

If you are invited to interview you must confirm your attendance by the deadline stated in the invitation

email. If you do not do so we will assume you are no longer interested. If there is to be a presentation or test you will be informed of this in advance.

If you have a disability and require special arrangements to be made, please notify us as soon as you are shortlisted so we can try to accommodate your needs.

You will be told during the interview when you may expect to hear the outcome.

Although we appreciate the time and effort that goes into applying for a post with us, we do not give individual feedback on applications or interview performance.

Successful candidates will be required to provide their original qualifications, proof of the right to work in the UK and the details of two referees before they commence employment.

We look forward to receiving your application.

