



Job Description

Financial Analyst

The Financial Analyst role is responsible for providing support within the finance team and wider business to ensure accurate data analysis, reporting and modelling at Summerset

This job description provides an overview of the responsibilities and tasks of the role. You may be required to perform job related tasks other than those specified.



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Business Unit	Corporate Services
Department / Team	Finance
Reporting Line	Head of Commercial Finance
Contribution / Responsibilities	Feasibility Modelling for the acquisition of Retirement Villages • Feasibility modelling for possible land acquisitions for the building of retirement villages and the subsequent construction of these • Preparation of sales pricing for acquisition feasibility modelling • Estimates margin calculations under various build and acquisition scenarios and the subsequent construction of these • Preparation of land acquisition papers for recommendation to the Board of Directors • Preparation of reports and information for internal land and development steering group meetings • Work with Development, Construction and Sales to determine the needs of the business around delivery schedules NZ Retirement Unit Sales Pricing • Regular resales pricing reviews – review of movements in the respective residential market and provision of comprehensive and appropriate information to relevant stakeholders for decision-making • New sales pricing – preparation of initial pricing papers for new units built in accordance with agreed pricing guidelines, for recommendation to management • Ownership of residential market and competitor analysis to inform decision making • Effectively responding to queries from Sales Managers regarding occupation right pricing as well as other areas of the business (incl. Development and Construction) Business Partnering • Grow financial capability across the development teams by partnering with them to add robustness to forecasting and reporting processes and ensure strong financial management processes • Provide comprehensive and appropriate information by monitoring, reviewing, and analysing financial information related to the purchase of new sites • Ensure consistency and accuracy of relevant financial information • Undertake benchmarking activities for relevant cost Strategic and Financial Analysis • Undertake complex pieces of analysis and financial modelling, providing valuable business insights and recommendations • Contribute to strategic projects and development of Summerset's long term strategic plan Other • Assisting with the preparation and analysis of half and full year valuations for financial reporting for external reporting and other investor relations related work • Ad hoc treasury and analysis work required by the business • providing assistance across a number of ad hoc project initiatives • Provide solutions for improvement opportunities • This job description includes the main duties and responsibilities of the Financial Analyst; however, you will be required to perform other tasks and duties that would reasonably fall within the responsibilities and skill of the role

Health & Safety	Be a proactive contributor to ensuring the health & safety of our people, our customers, our contractors, and our residents. This includes conforming to Summerset's safety culture expectations of an environment of zero-harm and compliance with health and safety policies and procedures.
Qualifications and Experience	• Relevant Tertiary Qualification • Experience in a corporate finance or accounting role (minimum 3 years) • Proven financial modelling, analysis, interpretation and business reporting skills • Ability to identify opportunities for data to enhance business decisions, and manipulate data to provide value • Very good oral and written communication skills • Previous modelling knowledge would be an advantage but not a requirement • Strong computer skills, particularly Excel • Previous experience using Technology One or IBM Planning Analytics is advantageous • Innovative problem solver
Relationships	• Finance Team • Sales Team • Marketing Team • Development Team • Construction Team

Values		
 STRONG ENOUGH TO CARE We treat our residents like family. We do what's right. We respect people as individuals.	 ONE TEAM We look out for each other. We take ownership and follow through. We share and listen to each other's ideas.	 STRIVE TO BE THE BEST We work hard. We like to win. We're always learning and improving.