

# FP&A Lead (Vice President)

## About Capital Dynamics:

Capital Dynamics is an independent global asset management firm focusing on private assets, including clean energy, private equity (primaries, secondaries and co-investments) and private credit.

Established in 1988, the Firm has extensive knowledge and experience developing solutions tailored to meet the exacting needs of a diverse and global client base of institutional and private wealth investors. Capital Dynamics oversees more than USD 14 billion in assets under management and advisement and employs approximately 150 professionals globally across 12 offices in Europe, North America, and Asia.

Capital Dynamics is a recognized industry leader in responsible investment, receiving top marks (Five Stars) from PRI across all categories and investment strategies, as well as achieving strong results in GRESB benchmarking for its clean energy strategy.

## Department Overview:

### Finance:

The Capital Dynamics Finance team manage all elements of operational finance, reporting and regulatory reporting obligations. Further, the team provides oversight, controls, and protection to safeguard the firm's interests and budgets while upholding the financial integrity of the business. The team also partners with the business and stakeholders to drive value creation and efficiencies within the wider organization, either directly or by enabling improved performance to support the firm's continued growth. The team consists of 16 professionals who implement the oversight and control to mitigate risks while delivering on the strategic objectives of the firm.

## Role Purpose:

Capital Dynamics (CD) is seeking a qualified accountant to join our Finance team in the role of **Financial Planning & Analysis (FP&A) Lead** reporting into the CFO.

As the FP&A Lead, you will be responsible for supporting the deliver a robust planning and performance management framework, with a wide scope covering:

- support of group financial planning, modelling, and forecasting
- annual budgeting process and regular reporting
- implementation of processes improvements to provide efficient scenario planning capabilities and insightful analysis of business performance and forecasts.

You will be accountable for providing key financial insight regarding current and future business performance to both the senior leadership team and group stakeholders. Key to this will be owning the reporting and planning of annual budgeting and long-term planning across the entire Capital Dynamics group.

This will involve leading the monthly management reporting, business line reporting including budget variance review, data interrogation, analysis, and modelling activities.

It is important the FP&A Lead can operate in a stand-alone role, with proven experience driving multiple projects and workstreams while collaborating with a range of stakeholders.

**Key responsibilities:**

To succeed in this role, you will:

- Take ownership of the annual FP&A timetable to ensure activities across the Finance department run to schedule
- Lead the detailed forecast and budget process across the Capital Dynamics Group ensuring timely preparation in accordance with agreed timelines by group, legal entity and business unit
- Work along the CFO on the preparation of Board and Exec reports; co-ordinate with business stakeholders and financial control to provide commentary of key variances
- Lead all financial modelling and reforecasting, whether P&L, balance sheet, cash flow etc
- Ensure regular analysis of variances between forecasts are conducted to keep management and key stakeholders informed of changes and trends
- Prepare, review and monitor full monthly management reporting and explaining variances to budget and forecasts
- Lead the ongoing development and distribution of monthly management reporting and analytics to the senior executive and business unit heads
- Develop a suite of KPI's and metrics to accurately measure business performance
- Produce and communicate ad-hoc pieces of analysis as requested
- Contribute to and drive development of the finance platform by working closely with Technology, HR, Fund Operations and other relevant teams
- Support the development of existing and potentially new systems to reduce the dependency on excel and improve efficiencies and timeliness.

**This description is for guidance purposes only. You may be required to fulfil additional roles and perform additional duties as required by the Company from time to time.**

**Background and experience:**

- Qualified Accountant - minimum of 5 to 6 years post qualified experience (pqe), with at least the last 3 in an FP&A focused role
- Previous experience working within a private equity / asset management, fintech, start-up environment is preferred
- A confident business partner with exposure working in a fast-paced high growth environment
- Proven experience collaborating with a wide range of business units in a global work environment

- Previous experience working on an ERP implementation, or supporting systems integrations and automation initiatives
- Prior experience of implementing or developing business intelligence tools would be highly advantageous
- Hands on approach with a readiness to be flexible and pragmatic

**Education and Qualifications:**

- Qualified Accountant (ACA / ACCA / CIMA)
- Educated to bachelor's degree level or equivalent
- Advanced Microsoft skills, particularly in Excel (tables, reports, queries).
- Working knowledge of Microsoft Dynamics, Salesforce or other CRM tool, investor reporting portals.

**Competencies**

We are looking for the following personal attributes:

- A good listener with excellent communication skills and the ability to translate financial models and reporting to a wide audience in an understandable and professional manner
- Strong attention to detail
- The ability to simplify complex issues for non-finance people
- A team player, and strong partnering pedigree
- Ability to work remotely and/or with individuals in other locations

**Diversity & Inclusion:**

Capital Dynamics is an Equal Opportunity Employer and is committed to creating a global diverse workforce. We are a global company with 24 nationalities represented across our staff in 12 offices, spanning North America, Europe, the Middle East and Asia. We believe diversity and inclusion ("D&I") is key to being better at what we do, and our initiatives are designed to attract, develop, and advance talented individuals, regardless of race, sexual orientation, religion, age, gender, disability status or any other dimension of diversity. We welcome and strongly encourage suitably qualified applicants from a wide range of backgrounds to apply to join Capital Dynamics.