
JOB DESCRIPTION

Job Title: Finance Business Partner – Income and Direct Costs

Grade: D

Department: Finance

Main purpose of job:

The Finance Business Partner will support the Senior Finance Business Partner in delivering high-quality financial insight and business partnering to income-generating profit centres. The role will contribute to understanding key financial drivers and assumptions, supporting scenario analysis, and helping to build and maintain cost-to-serve models.

The postholder will also support the financial management of the organisation's transformation programme, including cost tracking, reporting, and benefits monitoring. This role is intended as a developmental position, offering exposure to senior stakeholders, commercial finance, and transformation activity within a mission-led financial services environment.

Responsible to: Senior Finance Business Partner – Income and Direct Costs

Budgetary responsibilities: None

Responsible for: None

Key Job Responsibilities:

Financial Analysis & Business Support

- Support the Senior Finance Business Partner in providing financial analysis and insight to income-generating areas.
- Assist in analysing revenue, costs, and performance against budget and forecast.
- Prepare regular management information, variance analysis, and commentary for stakeholders using one source of truth.

Scenario Analysis & Cost-to-Serve

- Support the development and maintenance of financial models, including scenario and sensitivity analysis.
- Assist in capturing and validating assumptions used in forecasts and modelling.
- Contribute to the maintenance and development of cost-to-serve models.

Transformation Programme Finance

- Support financial tracking and reporting for the transformation programme.
- Assist in monitoring programme costs against budgets and approved business cases.
- Help track benefits realisation using the cost-to-serve framework and agreed metrics.
- Work with colleagues in CAF America to ensure Group information is accurate and consistent.

Financial Reporting & Control

- Support accurate financial accounting, including reconciliations and analysis relevant to supported areas.
- Ensure data quality, consistency, and auditability of financial information.
- Assist in month-end and year-end processes as required.

Stakeholder Management

- Build effective working relationships with non-finance colleagues.
- Explain financial information clearly to support understanding and decision-making.
- Actively seek feedback and development opportunities to build business partnering capability.

CAF Values and Behavioural Indicators

The CAF Values and Behavioural Indicators set out in a transparent and consistent manner the explanation of the performance expectations of all CAF People. Through the use of common language and common standard, it combines a set of behaviours with the required technical skills and knowledge needed to effectively perform in any given role in CAF. This is used for the assessment, management and development of performance of all our people across CAF

Please refer to the link: [CAF values and indicative behaviours](#) for the CAF Values and Behavioural Indicators.

Date: March 2026

PERSON SPECIFICATION

Job title: Finance Business Partner – Income and Direct Costs

Date: March 2026

Attributes	Essential ✓	Desirable ✓	How Evidenced ⁺
Experience <ul style="list-style-type: none"> • Experience in a finance role with exposure to management accounting, reporting, or financial analysis. • Experience supporting budgeting, forecasting, or management reporting processes. • Understanding of core accounting principles and financial controls. • Strong Excel and financial modelling skills. • Exposure to business partnering or working directly with non-finance stakeholders. • Experience supporting projects, change initiatives, or transformation activity. • Awareness of cost allocation or cost-to-serve concepts. • Experience of working in a complex organisation. • Experience of working within financial services or the third sector. 	✓ ✓ ✓ ✓ ✓	✓ ✓ ✓ ✓	A & C & E
Qualifications <ul style="list-style-type: none"> • Part qualified or newly qualified accountant (e.g. ACA, ACCA, CIMA or equivalent). • Actively studying towards qualification if not yet qualified. • Relevant finance or accounting degree or its equivalent. 	✓	✓ ✓	A & C & E
Specialist Skills/ Ability/Knowledge <ul style="list-style-type: none"> • Strong analytical and problem-solving skills, with attention to detail. • Proven ability to work autonomously in a fast-paced and fluid environment, demonstrating initiative, adaptability and sound judgement. • Knowledge of accounting standards, tax regulations, and VAT requirements. • Competent using Microsoft Outlook, Excel and Word. • Familiar with using accounting systems. 	✓ ✓ ✓ ✓	✓	A & C
Communication <ul style="list-style-type: none"> • Ability to communicate with all levels of staff clearly and effectively. • Strong verbal and written communication style. • Collaborative approach and commitment to building positive working relationships. 	✓ ✓ ✓		A & C

<p>Personal Qualities</p> <ul style="list-style-type: none"> • Drive. • Positive, flexible, can-do attitude. • Strong team player. • Curious and keen to develop commercial and business partnering skills. • High levels of integrity, professionalism and discretion. • Well-organised with the ability to manage multiple tasks and deadlines. • A proactive, improvement-focused mindset with a strong sense of ownership and ability to deliver to agreed deadlines. • Interest in, or commitment to, the charitable purpose and values of the organisation. 	<ul style="list-style-type: none"> ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ 		A & C
<p>Special Conditions</p> <ul style="list-style-type: none"> • "Office first" role based in Kent. 	<ul style="list-style-type: none"> ✓ 		A & C
<p>Prior to Appointment</p> <p>All posts:</p> <ul style="list-style-type: none"> • Credit Check • Sanctions Check • Basic DBS Check • Employment References • Medical Clearance • Right to Work in the UK 	<ul style="list-style-type: none"> ✓ ✓ ✓ ✓ ✓ ✓ 		R/E

✓ Tick either the Essential or Desirable column as appropriate for each attribute

† Insert the code from the key below for how you intend to assess this requirement e.g. at interview, via references etc.

Key

R = References, E = Evidence/Certificates, A = Application, C = Competency Interview, T = Testing/Assessment