

# Equity Financial Trust

## Manager, Financial Planning & Analysis

**Job Location:** Toronto  
**Reports to:** Vice President, Finance  
**Direct Reports:** 2  
**Employment Type:** Permanent Full-Time

### Company Overview:

We are a fast-growing mortgage lender with over one billion dollars of assets and our vision is to change the face of alternative lending in Canada. We seek to distinguish ourselves as an innovative and respected leader in the alternative lending market by investing in our people, partners and technology to drive innovation that redefines the customer experience. New core operating systems, newly designed open-concept office space and planned expansion to the western provinces are examples of how we are working toward our strategic goals.

The Finance team strives to be a strategic partner to senior management and the business by offering advice and financial expertise. Our goal is to offer our financial acumen and integrate our modelling capabilities throughout the organization to create value to the business. Specifically, the FP&A arm of the Finance team will focus on helping operations achieve better process efficiency and make better business decisions with the use of data and analysis.

### Overview of Position:

The Manager, Financial Planning & Analysis will deliver accurate and timely information that provides actionable insights to key stakeholders, particularly senior management. This position role will also play a key role in our business intelligence and data governance initiatives to advance KPI and analytics reporting capabilities.

### Job Responsibilities:

#### Strategic Planning & Forecasting (40%)

- Responsible for monthly financial forecasting process
- Lead the annual financial planning and budgeting process
- Review and improve existing planning and forecasting process through automation or efficiencies
- Develop financial models for new and existing business initiatives
- Perform analysis to monitor and evaluate financial performance of new and existing business initiatives
- Working with large amounts of data and information from multiple sources and produce summaries appropriate for senior management audience
- Prepare ad hoc materials for Board of Directors as required

#### Internal Management Reporting & Analysis (40%)

- Collaborate with senior management to develop KPI reporting in support of strategic objectives and decision making
- Monitor KPIs on a daily, weekly and monthly basis, identifying trends and proactively working with operational leaders on opportunities to grow the business
- Proactively reengineer/streamline existing KPI reporting & analysis through automation, consolidation, and reorganization

- Lead the development of KPI reports as part of the business intelligence initiative
- Special projects as required, including involvement with Data Governance, Data Warehouse

### **Leadership (20%)**

- Lead and provide guidance and support to a team of 2 direct reports
- Ability to be a finance leader amongst peers and across business functions and projects

### **Requirements:**

- Minimum of 3 – 5 years in an analytical and planning role, with 1+ years managerial experience
- Accounting designation (CPA, CMA or CPA, CA), MBA or CFA
- University degree in related field, or equivalent business experience
- Excellent written and verbal communication skills
- Strong financial acumen and analytical skills to interpret numbers into a business context
- Experience developing KPIs with a view to IFRS compliance, stakeholder interpretation and performance management

### **Preferred:**

- Financial services/banking industry experience
- Experience working with Cognos Analytics an asset
- Strong PowerPoint presentation development skills
- Advanced mathematical and analytics skills
- A willingness and ability to adapt to a changing environment and responsibilities in a growing company
- Tech savvy with ability to learn new business platforms quickly
- Strong supervisory skills including coaching and development of intermediate staff members

### **Compensation & Benefits:**

- Salary: Market competitive, commensurate with experience
- Bonus: Target rate based on annual Performance Agreement
- Long-term incentive plan: Achievement of corporate milestones
- Benefits: Industry competitive health & dental, RRSP, vacation, paid leave days and more!