

Finance Analyst – Capital & Investments

Society Division:	Finance
Society Reporting Unit:	Commercial Finance – FP&A
Location:	Warwick/Lichfield (Hybrid)
Reports to (job title):	Finance Manager – Capital & Investments
Number of direct reports:	0
Number of in-direct reports:	0
Budget / Revenue Responsibility:	Senior Head of Commercial Finance
Key Stakeholders:	Commercial Finance, Group Finance
Date of Job Description:	22/06/2026

Role Purpose:

To assist and support the analysis of Society wide capital investment projects - including asset optimisation, new store openings and divestments to ensure that investments are prioritised and maximised to generate the best return for the overall Society.

Role Responsibilities:

- Assist in the measurement, reporting and analysis of Society investments
- Assist in identifying and analysing key investment performance indicators
- Assist in reporting and analysing progress against strategic priorities / performance of key programmes including development projects, acquisitions and disposals.
- Assist in the review and consolidation of capital budgets and forecasts
- Assist in the reporting production of post investment reviews and development of appropriate reports to highlight key learnings, agreed actions, and emerging trends. Maintaining detailed reports to regularly report on performance across the whole Society.
- Provide financial support to ad-hoc projects as directed.
- Support the Finance Manager – Capital & Investments where required.
- Occasionally situations may arise where other duties or tasks may be required as reasonably requested by the Society.

Qualifications & Experience:

Essential Qualifications

- Professionally Qualified Accountant (ACCA/ACA/CIMA) or studying towards qualification

Desired Qualifications

- Qualified Accountant (ACCA/ACA/CIMA)

Essential Experience

- Commercial and financial acumen, and able to develop an understanding of the key drivers of the business area.
- Strong excel skills and experience in manipulating large data quantities.
- Organised and able to deliver to deadlines.
- Ability to work under own initiative and demonstrate proactive approach to issue resolution.
- Ability to challenge current practice and processes and drive continuous improvement.
- Ability to work collaboratively with both cross functional and finance colleagues.

Desired Experience

- Experience of budgeting and forecasting.
- Experience of capital budgeting, investment analysis or portfolio performance measurement.