



Financial Analyst

Job Description

Who We're Looking For

We are looking for an accountant (or equivalent qualified person) to provide financial, accountancy and commercial expertise in support of the Senior Acquisition Consultant, Corporate Development Director and the Finance Director.

About Benchmark Capital

Benchmark Capital powers financial advisers through insight and integrated tools, services and investment solutions that help them differentiate their client proposition.

Helping advisers to look after their clients is at the centre of everything we do. Our award-winning solutions support over 150 advice firms, with £17.1 billion of assets under advice¹

With a technology-led ecosystem of regulatory, platform, and investment services, and our own financial planning business, our approach is guided by delivering safety and security for customers and focused on positive client outcomes.

We believe that first-class client service and integrated technology are essential components for long-term success. Our seamless, holistic approach works in harmony both to empower advisers and their clients and to generate tangible financial and competitive advantages.

We work with some of the most successful financial planning firms in the UK, bringing the power of technology to advice and wealth management

¹As at 31.03.21

The base

You'll be based at our Broadlands Business Campus near Horsham in West Sussex. It has high standards and international reputation, without being in the city: a big, countryside campus means life will feel a little different. This role may require the need to travel to clients across the UK.

We support our offices by using cutting edge software and hardware and our spacious campus facilities mean there's a great working environment for the team. With an on-site restaurant, coffee shop and gym, our campus has much to offer. And commuters can relax on our dedicated regular shuttle bus to and from Horsham's main line train station.

We know that helping you balance personal and professional commitments is a big part of that, so we're open to flexible working. Many of our staff work flexibly in many different ways, including part-time. Please talk to us at interview about the flexibility you need.

What You'll Do

- Participate in discussions during initial stages of engagement with potential acquisition partners, including financial and business information gathering.
- Analysis of business data including review of financial statements; review of business processes and client outcomes; and analysis around “business fit” with Benchmark Capital.
- Prepare valuation models and internal rate of return calculations in line with our valuation processes and parameters.
- Prepare investment reports for key stakeholders for investment review.
- Provide ongoing performance data analysis post-acquisition, including preparation of internal management information.
- Support our partners when they acquire a business or client bank.
- Complete financial analysis of companies which Aspect8 is seeking to buy, whether via asset or client-bank purchase.
- Review partner narrative and cash-flows when Benchmark provides funding to support business development.
- Co-ordinate and communicate the pipeline / forthcoming projects to relevant parties to ensure business readiness (e.g. BP Membership, Finance, Onboarding, Training etc.)
- Ensure that all Corporate Governance requirements relating to acquisitions are met, including compliance, regulatory and Schroders intervention points
- Undertake financial due diligence on potential acquisition partners as part of our risk management processes
- Regular interaction with our external legal counsel as part of shaping deal structures and review of legal documentation to ensure the drafting achieves desired legal and commercial outcomes
- Be the focal point for communications between the Acquisitions Team and the external partner for relevant acquisition opportunities
- Provide support to the Finance Director on ad-hoc accounting requirements in relation to audit process, generation of ongoing management information and other prescribed activities.

The Knowledge, Experience And Qualifications You Need

- Accountancy or equivalent financial services recognised qualification.
- Ideally 5+ years post-qualification experience in accountancy and financial services.
- Proven ability to marry financial and commercial analysis and drive opportunities to completion for the mutual benefit of Benchmark and our partner firms.
- Strong analytical skills and a meticulous eye for detail
- Excellent written and verbal communication.
- Strong client facing skills.
- Highly self-motivated with a desire to add value to the role, to Benchmark and to our partners
- Be adaptable to an environment where deadlines and priorities can change rapidly.
- A desire to self-develop, including study towards further professional qualifications and additional industry training.
- Strong IT skills, specific competence in Word and Excel.
- Good administrator.

What You'll Be Like

- Ability to provide a commercial judgement backed up by financial data.
- Team player.
- Hand-on approach.

We're Looking For The Best, Whoever They Are

Benchmark Capital is an equal opportunities employer. You're welcome here whatever your socio-economic background, race, sex, gender identity, sexual orientation, religious belief, age or disability.

Important Information: Issued by Benchmark Capital Limited, Broadlands Business Campus, Langhurstwood Road, Horsham, West Sussex, RH12 4QP. Registration in England No 09404621.