

Perspective is a national financial planning and wealth management group which operates from 20 offices across the UK employing 225 staff, including 80 highly qualified advisers. It provides impartial, specialist advice for individuals, corporates and trustees on pensions, retirement planning, inheritance tax planning, investments and group risk and business protection matters, often working closely with other professional advisers such as accountants and lawyers.

The group differentiates itself by having a strong and ethical client-centric culture, a robust compliance approach and a clear focus on developing its pipeline of trainee adviser talent through its workplace based in-house Training Academy.

CBPE Capital LLP recently made a major investment in Perspective to support the Group's management team with their continued focus on providing high quality advice to their existing client base, growing organically and making selective acquisitions.

Perspective has gained a reputation as the 'acquirer of choice' for Financial Planners looking to retire and exit the industry and for larger Financial Planning firms looking to join an established and growing industry leading group.

Financial Accountant (ref:145)

Basic Information:

Location: Remote (Chorley office 1-2 times a week)

Hours: Full time 9.00am - 5.00pm, Monday - Friday

Salary: £43-45k dependant on experience and qualifications

Benefits: 25 days holiday (rising with length of service) plus Bank Holidays, Eyecare, Pension and Life Assurance, Holiday Purchase Scheme

Role Description:

We have a fantastic opportunity to join our growing finance team as a Financial Accountant. The successful candidate will report to the Group Finance Manager and will form a vital part of the finance team helping assess the financial implications of business decisions to aid growth and profit.

Specific Responsibilities:

The key duties of the role are listed below. Due to the nature of the business, the role may also include additional responsibilities considered reasonable:

- Acquisition accounting
- Supporting financial integration of newly acquired businesses
- Preparation of the Board Packs and Covenants Reporting with Group Finance Manager
- Working alongside the Data Analysis team to provide various KPI and business insights reporting for the group.
- Helping the Group Finance Manager with preparation of models and analysis for the key senior stakeholders
- Liaising with external audit team and tax advisers
- Helping the Acquisitions Associate Director with Financial DD on prospective acquisitions.
- Providing technical support to the Group Finance Manager and CFO.
- Supporting the preparation and delivery of the PE exit over the next 12-24 months
- Support the delivery of other ad-hoc projects as required

Perspective's flexible and pragmatic approach means we can create mutually beneficial acquisition deal structures and completion timescales, while priding ourselves on delivering a client-centric, ethical approach focused on long term (often multi-generational) client relationships.

Privacy Policy

Perspective Financial Group Ltd ("us", "we") respects your right to privacy. Our Privacy Policy explains who we are, how we collect, share and use personal information about you, and how you can exercise your privacy rights. Our Privacy Policy is available on our website <https://www.pfgl.co.uk/privacy-policy/>

Experience & Skills:

The successful candidate needs to be motivated, friendly and professional at all times.

Key requirements are:

- Newly qualified accountant (ACA, ACCA or CIMA)
- Previous experience within audit or financial services is highly advantageous
- Highly skilled user of Microsoft Office, capable of the creation and maintenance of often complex spreadsheets and the analysis of data, and high-quality PowerPoint presentations.
- A reliable person who has the ability to manage and prioritise workloads and coordinate a number of simultaneous projects and communication streams
- Excellent organisational and multi-tasking abilities are essential
- Able to provide technical accounting expertise under FRS102
- Ability to produce concise business correspondence, proof read for grammar, spelling and punctuation with a high degree of accuracy
- Comfortable in a high growth and ever-changing business
- Experience of working as part of a team and able to work remotely with colleagues often in virtual environments such as Microsoft Teams and Zoom.

How to apply

Please send your CV and cover letter to recruitment@pfgl.co.uk

For an informal discussion about the role, contact Daria Opanowska, Group Finance Manager; 0161 244 9759

Any unsolicited CVs will be sent at the recruitment agency's own risk and will be interpreted as 'gifts' and we have no liability to you for any fee or otherwise. We reserve the right to engage with candidates directly having not, in any way, entered into your terms and conditions. By submitting an unsolicited CV to us, or to any member of our staff, you accept these terms as the default position.