



Role description Financial Adviser

Introduction

The Partnership Brokers Association's (PBA) vision is of *a world where humanity flourishes in fair societies and vibrant ecosystems because people collaborate bravely across boundaries in the spirit of partnerships.*

Transforming the Field of Partnering Practice.

We are an international, not-for-profit organisation dedicated to enhancing the effectiveness and impact of multi-stakeholder collaboration. Our purpose is to explore, exchange and promote effective multi-stakeholder partnering practices and principled forms of collaboration that accelerate transformative shifts in behaviours, attitudes, and systems to create a more just and sustainable world. PBA's mission is to promote and support professional standards in partnership brokering and to advance the global understanding of effective partnerships.

Role overview

PBA is seeking a highly skilled and dynamic Financial Adviser to oversee its financial matters. The successful candidate will provide expert advice and guidance on financial operations, ensuring robust financial systems and controls are in place. Key responsibilities include:

- Advising the Board of Directors on the financial implications of strategic decisions, ensuring that all actions align with the PBA's financial objectives.
- Offering impartial, clear, and sound financial counsel to the Board and the Stewardship Team, fostering confidence and supporting decision-making processes.
- Acting with integrity, independence, and professionalism at all times, safeguarding the company's financial interests and maintaining a strong ethical stance.

The ideal candidate will demonstrate a strong commitment to excellence and the ability to provide strategic financial insights while upholding the highest standards of confidentiality and accountability.

Key Responsibilities

As part of the PBA Finance Team and leading the team, the Financial Advisor plays a critical role in maintaining the financial health of PBA, offering strategic advice, ensuring compliance, and overseeing day-to-day financial operations. The Financial Advisor works closely with PBA's Accounts administrator.

Key responsibilities are:

- Work with the core team on the annual Business Planning process and help devise and produce the annual Budget.
- Assist in the compilation and analysis of the Approval and circulation of monthly /quarterly financial and management accounts, including a brief narrative report.
- Offer high level advice and guidance in support of and to help achieve the targets set out in the Business Plan.
- Act as one Authorised Signatory on all bank accounts and manage relationships with external financial institutions and banking partners.
- Oversee and liaise with auditors for the annual audit and other matters as required from time to time.
- Ensure VAT compliance and reporting.

- Be familiar with the cover afforded by all insurance policies and provide information on matters that may affect cover. Ensure appropriate insurance policies are in place and up to date.
- Ensure timely payment of all taxes.
- Ensure all accounting policies are compliant with current accounting practices.
- Keep updated on all legislation that applies to the company and advise the core team and Board of Directors as appropriate.
- Maintain and update the company's Statutory Register.
- Annual filing of Annual Return and audited accounts and updating Companies House for directors' appointments and resignations via auditors and company secretarial advisors.
- Manage the annual Declaration of Interest process.
- Provide strategic guidance on corporate governance best practices, while developing and implementing effective risk management strategies to identify, assess, and mitigate financial risks.

Profile

The role may be particularly well-suited for a seasoned finance professional who is looking to apply their skills and experience in a meaningful way outside of a traditional full-time career path. This could include individuals who are semi-retired, transitioning out of the corporate sector, or those seeking to contribute their expertise to a purpose-driven organization. The role is modestly compensated and may appeal to candidates interested in longer-term engagement in a supportive and values-based environment.

Skills & experience – essential

- Professionally qualified with working knowledge of UK accounting and company law.
- Demonstrable senior financial management experience and competence, ideally with a background in both not for profit and business environments.
- Demonstrable understanding of not-for-profit organisation dynamics.
- Experience of working with Boards and high calibre leadership.
- Ability to think strategically, and exercise good, independent judgement.
- Ability to work effectively as a member of a small team.
- Ability to blend strategic thinking with enthusiasm for detail and analytical curiosity.

Commitment: Required to attend Board and other meetings (usually online due to the geographically dispersed nature of PBA).

Motivation:

- Enthusiasm for the work of the PBA and its mission.
- A positive can-do attitude.
- Enthusiasm for team working.

Terms and Conditions

- Consultant contract.
- Up to the equivalent of 30 days per annum (7.5 hours per day).
- £350-£400 per day to be invoiced quarterly.
- Location: home-based, preferably in the UK.
- Requires a degree of flexibility on availability.

Application timeline

Interested applicants should send with their resume and a cover letter indicating their rationale for considering the role and how they are fit-for-purpose for the said position. All applications need to be sent to info@partnershipbrokers.org by 11 April 2025

Shortlisted candidates will be notified by 18 April 2025 and invited for an on-line interview. The Recruitment Committee will make the final decision by 25 April 2025 so the Financial Advisor can come on board and commence the responsibilities by 1 May 2025.