



Alzheimer's  
Society

# Financial Partnering, Planning and Analysis (FPPA) Assistant

## Job description

Together we are help and hope for everyone living with dementia



# Who we are

**Dementia is the UK's biggest killer. One in three people born in the UK today will develop dementia in their lifetime.**

At Alzheimer's Society, we're the UK's leading dementia charity and the only one to tackle all aspects of dementia by giving help and hope to people living with dementia today and in the future. We give vital support to people facing the most frightening times of their lives, while also funding groundbreaking research and campaigning to make dementia the priority it should be.

**Together with our supporters, we're working towards a world where dementia no longer devastates lives.**

# Our values

Our values tell everyone who we are as an organisation.

Our values make sure that our focus is clear for the challenges and opportunities ahead and remind us of what we all stand for.

Our values are evident in everything we do, how we do it and how we work together.

These are not just words on a wall, we live these every day in all our work. We are determined to make a difference when and where it matters most, by being passionate, focussed and making a lasting impact for people affected by dementia.



## Determined to make a difference

We're passionate, we're focused and we make a lasting impact for everyone living with dementia.



## Trusted expert

We're listening, we're learning and we use experience and evidence.



## Better together

We're open, we combine our strengths and we achieve more together.



## Compassionate

We're kind, we're honest and we don't shy away from challenges.

Through our values we will make the greatest difference for people affected by dementia. Whether you are someone living with dementia, a family member or carer, a supporter, a donor, a colleague from another organisation, an employee or a volunteer, these four values will shape your experience with Alzheimer's Society.

# Financial Partnering, Planning and Analysis (FPPA) Assistant

## Position in the organisation

**Reports to:** A Finance Business Partner, Financial Planning Analyst or Financial Analyst (depending on rotation)

Member of the Finance team

Part of the Finance & Assurance Directorate

This role forms part of a small cohort of FPPA Assistants who will rotate across Financial Partnering, Financial Planning and Financial Analysis to gain broad experience of the Society's financial management and decision-support activities. There may also be opportunities for assistants to rotate into similar roles elsewhere within the Finance and Assurance Directorate.

The role includes financial support for professional accountancy training (such as AAT, CIMA or ACCA) and protected study time, typically following an initial period in role and aligned to an agreed development plan.

## Purpose of this role

At Alzheimer's Society, we are advisors, supporters, fundraisers, researchers, influencers, communicators, technical specialists — and so much more. Together, we are here to make a difference to the lives of people affected by dementia.

In Finance & Assurance, our vision is to be the Society's single point of financial truth. We are trusted partners and credible experts, working as one team to enable confident decision-making and maximise the impact of our resources.

The FPPA Assistant role is a developmental, rotational finance role designed to support this ambition. FPPA Assistants provide high-quality support across financial partnering, planning and analysis activities, while developing their own technical capability, organisational understanding and confidence working with colleagues across the Society.

Through structured rotations, the role provides exposure to:

- Working with budget holders and senior stakeholders
- Financial planning and forecasting processes
- Financial analysis, modelling and insight

## Financial Partnering

- Support Business Partners in preparing financial reports, forecasts and analyses for directorates and teams.
- Assist with modelling options and scenarios to support budget holder decision-making.
- Help translate financial information into clear, accessible insights for non-finance colleagues.

## Financial Planning

- Support the coordination and administration of forecasting and budgeting cycles.
- Assist with data collection, validation and consolidation across teams.
- Help maintain planning models, assumptions and documentation.
- Support the preparation and maintenance of BAU management reporting.

## Financial Analysis

- Support the production of financial analysis, trend reviews and insight packs.
- Assist with data extraction, validation and interpretation from finance systems.
- Help curate and organise financial analysis outputs so they are accessible and reusable.

We are looking for someone who exemplifies our values, someone who is: **Determined to make a difference** when and where it matters most. **A trusted expert** who believes in working **Better together** and demonstrates true **Compassion**.

## Key accountabilities and responsibilities

Across all rotations, the FPPA Assistant will:

- Support the delivery of budgeting, forecasting, modelling, analysis and reporting activities in line with Finance & Assurance policies and priorities.
- Help colleagues across the Society to navigate financial processes, systems and products, acting as a supportive first point of contact.
- Assist with the preparation, organisation and presentation of financial information to support insight, decision-making and accountability.
- Contribute to the development of clear, engaging finance communications, including guidance, templates and internal materials.
- Support initiatives to improve financial literacy and confidence, particularly for new budget holders and entry-level colleagues.
- Work collaboratively with colleagues across Finance & Assurance to identify duplication, inefficiency or opportunities to improve ways of working.
- Maintain accurate records, files and documentation to support transparency, auditability and effective team working.

## We are looking for someone who can...

- Understand the critical role of Finance & Assurance as an enabling partner directorate in ultimately creating impact to end the devastation of dementia, linking everything you do back to the ultimate objectives of the Society.
- Use technology and tools available to minimise manual inputs, improve productivity, streamline processes and encourage use of a single source of truth
- Work collaboratively and enthusiastically with colleagues across Finance & Assurance and across the Society more widely to deliver first class partnership and expertise.
- Role-model our values and embrace a high challenge, high support, high performing environment.
- Administrate and organise own work to ensure that it is accurate and meets quality targets, reasonable deadlines, and reporting requirements.
- Drive continuous improvement in processes and products owned by the team.
- Have the ability and willingness to travel occasionally for team meetings, away days, etc., including occasional overnight stays as required. This is unlikely to be required more than a few times a year.
- Adhere to all the Society's service standards, policies and procedures.
- Comply with the data protection regulations, ensuring that information on clients remains confidential.
- Be enthusiastic for personal learning and development, to support the learning and development of others and the whole organisation.
- Work in a manner that facilitates inclusion, particularly of people with dementia.
- Implement the Society's health and safety policy and procedures, ensuring that all practices and procedures are undertaken in accordance with a healthy and safe working environment and that all staff and volunteers for whom you may be responsible are aware of their responsibilities in respect of their role, monitoring data and recommending action as required.
- Follow the Society's management information guidelines and requirements

## Person specification and selection criteria

Skills & knowledge	Application (A) or Interview (I)
3 x 'A' Levels or equivalent. A degree, apprenticeship or equivalent experience would be advantageous.	A
Good written and verbal communication skills, with the ability to explain information clearly to different audiences.	A/I
An interest in how finance teams, systems and processes operate, and a clear motivation to develop a career in Finance.	A/I
Evidence of being organised and methodical, with experience improving or maintaining processes, records or ways of working.	A/I
A willingness to learn new systems, tools and concepts, and to adapt to different areas of work as part of a rotational role.	A/I

Competencies & personal attributes	Application (A) or interview (I)
Takes initiative and is comfortable working independently as well as collaboratively.	I
Demonstrates curiosity and critical thinking, with an ability to identify opportunities to work more effectively or efficiently.	I
Delivers work to agreed timelines, even where tasks or information may be evolving or unclear.	A
Open to feedback and committed to personal learning and development.	A
Resilient and adaptable, with a positive work ethic and the ability to navigate change and diverse teams.	I
Welcoming and respectful of diverse perspectives, experiences and opinions.	A
A team player who enjoys working with others to solve problems and make improvements.	I

*Follow us on Twitter and Instagram @Alzheimerssoc and Like us on Facebook or check out Alzheimer's Society YouTube channel [youtube.com/AlzheimersSociety](https://www.youtube.com/AlzheimersSociety)*

# Our benefits



## Financial Security

- Group Personal Pension Plan with Scottish Widows – with up to 8% employer contribution rate
- Life Assurance Scheme – two times your annual salary
- Society Plus and Smart Spending App – giving you unbeatable savings at hundreds of retailers



## Health & Wellbeing

- Health Cash Plan
- 24/7 Employee Assistance Programme including online and face to face counselling
- Discounted gym membership with Society Plus
- Lived Experience Networks
- Mental health app and unlimited therapy



## Personal Development

- Apprenticeships
- Women in Leadership development programme
- Leadership development programme
- Financial support towards relevant professional qualifications



## Family & Dependants

- Enhanced family leave – 16 weeks paid for all parents
- Paid time off work for fertility treatments for both partners
- Paid carers leave
- Paid dependants leave
- Paid compassionate and bereavement leave
- Paid time off work to support those transitioning



## Recognition

- Annual people awards
- Long service awards
- Thank you eCards
- Values Hero and Society Legend Awards



## Work Life Balance

- Annual leave of 27 days increasing to 30, plus bank holidays
- Career breaks of up to 3 months
- Flexible working
- Wellbeing leave