

<b>Job title</b>	<i>Financial Planning and Analyst Manager</i>	<b>Department</b>	<i>Finance</i>
<b>Reports to</b>	<i>Chief Financial Officer</i>	<b>FLSA</b>	<i>Exempt</i>

### **Job summary**

This role will be a key asset in the future growth of the company. This individual will be leading the FP&A Function and will be spear-heading the Company's financial quarterly forecast, annual budgeting process, 3-year Strategic plan and all operating plans, including variance analysis and special projects. S/he will provide financial consulting and strategic support to senior management including preparing board presentations, financial presentations, capital expenditure analysis, industry/peer group comparisons, new business opportunities, acquisition analysis and other projects requested by senior management.

This function acts as the analytical engine of the company to provide insights and support 'optimal' business decision making.

### **Duties and responsibilities**

- Analyze current and past trends in key performance indicators including all areas of revenue, cost of sales, expenses and capital expenditures
- Monitor performance indicators, highlighting trends and analyzing causes of unexpected variance and work with respective leaders to develop, implement and track corrective actions needed to return the business to operating targets
- Develop and execute process and models to develop 3-year Strategic plan, Annual Budgets, Financial Forecasts, and Operating Plans including financial and non-financial metrics. Includes full set of financial statement (Balance sheet, Income Statement and Cash flow), Detailed sales and COGS plans and overhead expenses.
- Ad-Hoc Reporting and in-depth Analysis to supporting Senior Management Team and Departments heads
- Prepare all monthly and Quarterly Financial reports and related presentations to Board of Directors and Senior Management Team
- Implement and work with a VENA – our Business Intelligence Tool and Create dashboard reports for leaders to use
- Maintain overhead standards in the company and other estimating/quoting metrics in use to ensure profitability
- Develop financial models and analyses to support strategic initiatives
- Analyze complex financial information and reports to provide accurate and timely financial recommendations to management for decision making purposes
- Develop and implement integration process and participate in execution when targets are acquired

Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities and activities may change at any time with or without notice.

### **Education and experience**

- Highest standards of accuracy and precision; highly organized.
- Articulate with excellent verbal and written communication skills
- Ability to think creatively, highly driven, and self-motivated
- Demonstrated problem solving capabilities at highest level
- Demonstrated ability to roll-up sleeves and work with team members in a hands-on management capacity
- High degree of initiative in developing tools and reports to drive the business forward
- Bachelor's Degree in Accounting or Finance; MBA highly preferred
- 5+ years' experience as Manager or Director of Financial Planning and Analysis
- Deep command of Financial Accounting Principles and GAAP, including purchase accounting
- Strong leadership skills required. Experience in multi-branch HVAC or construction preferred
- Advanced Microsoft Excel and PowerPoint skills. Experience with Dashboards and/or Power BI a plus

### **Key performance indicators (KPI's)**

- Monthly reporting package completed within 3 days of monthly close
- Annual plan completed in 6 weeks (start to finish)
- Forecasts updated within 3 weeks (start to finish)
- Ad hoc Analysis projects completed on time to confirmed scope

### **Physical requirements and working conditions**

Regularly required to sit, stand, and walk; occasionally lift and/or move up to 15 pounds; noise level is usually moderate. All employees may be required to visit a customer site and/or complete a ride along with a field technician as part of their employment.

### **EEO statement**

Climate Pros is proud to be an Equal Employment Opportunity and Affirmative Action employer. We do not discriminate based upon race, religion, color, national origin, gender (including pregnancy, childbirth, or related medical conditions), sexual orientation, gender identity, gender expression, age, status as a protected veteran, status as an individual with a disability, or other applicable legally protected characteristics.

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<b>Approved by:</b>	<i>Patricia Burkland</i>
<b>Date approved:</b>	<i>10/26/2021</i>
<b>Reviewed:</b>	<i>10/26/2021</i>