

## JOB POSTING TEMPLATE

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| <b>Date:</b> <u>August 2022</u>   | <b>Function:</b> <u>Finance</u>  |
| <b>Job title:</b> <u>Associate Manager, Planning &amp; Expense Management</u> | <b>Manager title:</b> <u>Associate Director, Planning &amp; Expense Management</u> |

### Job purpose

- Budget management: build and review annual budget by cost center and by project
- Expense control: work directly with relevant department head to control actual expense vs. budget by cost center and project
- Expense report: prepare expense management report

### Major accountabilities

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| <p>1. Planning and forecast:</p> <ul style="list-style-type: none"> <li>- Work independent with all department heads to assist and advice how to build department budget within timeline</li> <li>- Review / challenge relevant budget owners to make reasonable budget</li> <li>- Consolidate and prepare master company budget yearly in consistency with actual recording and timely</li> <li>- Quality controls and checking of annual planning cycles</li> <li>- Deep dive analysis on expense forecast and planning as well.</li> </ul>   | 45% |
| <p>2. Expense Control:</p> <ul style="list-style-type: none"> <li>- Set-up the mapping between account booking and budget items, cost center and project code as well</li> <li>- Independent work with Accounting to guide/advice on the difference between GL team and Expense team (accrual, cost center, project code)</li> <li>- Independent work directly with GL team to ensure expense bookings reflect correctly all transactions from our business in the time manner; deadline respect</li> <li>- Coordinate between accounting team and other departments to follow up accrual monthly and yearly</li> </ul> | 15% |
| <p>3. Expense Report:</p> <ul style="list-style-type: none"> <li>- Analysis on initiatives / key expenses of the company and departments to ensure all are correctly classification, timely as requirements</li> <li>- Develop expense report, project report, reporting tools</li> <li>- Perform regular expense review and comment by cost center and project code</li> <li>- Perform deep dive analysis on expense unit cost by distribution channel, cost center and project code as well</li> <li>- Set up and Lead expense review meeting monthly</li> </ul>  | 35% |
| <p>4. Other tasks:</p> <ul style="list-style-type: none"> <li>- Process improvement study</li> <li>- Attend/member of small projects</li> <li>- Other requirement requested by line manager</li> </ul>  | 5%  |

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### Specialized knowledge

- Proficiency in MS office applications
- English fluent and good presentation skill
- Accounting & Finance knowledge.
- Analytical and interpret skills.
- Communication skill
- Problem solving skill
- Presentation skill
- Time management skill

### Problem solving

Corporate, team work, active listening, flexibility to adapt new approaches, proactive & high learning capacity.

### Education and experience

- Bachelor's degree, preferably in Accounting/ Finance or Economics major
- At least 3 years experiences in Accounting and Finance (Insurance experience is refer as plus)

### Communication scope

- Corporate & communicate with relevant budget owner to build budget and control expense

### Management scope

Total number of direct reports: 0

Total number of staff managed (direct and indirect): 0

### Metrics (if applicable)

Finance metrics (revenue, budget managed, etc.): none

Sales metrics (type and amount): none

Other metrics (specify): none

Travel required (express as % of working time):