Ho Chi Minh City

SENIOR SPECIALIST
FINANCIAL PLANNING AND ANALYSIS

At Sunlife, we're driven by our Purpose: To help Clients build lifetime financial security and lead healthier lives. Across Asia, we cultivate a **High-Performance, Caring Culture** that empowers our people to achieve outstanding results, embrace continuous growth, and create meaningful impact. We succeed together by fostering an inclusive environment where wellbeing, collaboration, and accountability are equally valued.

I. ACCOUNTABILITY

1. Finance business partnering and expense management

- Partner with assigned business and functional teams to translate enterprise strategy and operational plans into financial implications.
- Assess the impact of business decisions across Underlying Net Income, Reported Net Income, contractual and controllable expenses, and other financial items, considering relevant business, accounting, and actuarial drivers.
- Provide fact-based recommendations on resource allocation, budget utilization, cost control, and other financial decisions.
- Act as Budget Reviewer in Concur or Sun Life financial systems, validating budget availability, cost allocation, business rationale, and compliance with Company policies before approval routing.
- Partner with Finance Controllership and business stakeholders to ensure timely and accurate expense recognition, accrual review, cost allocation, and financial data used for reporting, planning, and forecasting.
- Support expense optimization initiatives assigned by Management.

2. Management reporting, financial performance analysis and recommendations

- Explain actual financial performance across profit, expenses, capital, solvency, and liquidity, including the underlying business, accounting, and actuarial drivers.
- Analyze variances against budget and forecast, changes in outlook, key assumptions, sensitivities, trends, risks, and opportunities; identify potential actions and provide analysis to support management decisions.

If this opportunities sound like a good fit for you, we'd be happy to receive your application at **VN_careers@sunlife.com.**

- Prepare and enhance management reports, key performance indicator dashboards, Regional Office reports, and project reporting to provide timely, accurate, and decision-relevant insight.
- Support monthly internal FP&A performance reviews and provide actionable recommendations to Management.
- Collaborate with FP&A team members to conduct deep-dive analysis across business initiatives, channels, functions, cost centers, projects, and productivity metrics to identify performance and efficiency opportunities.

3. Financial planning and forecasting

- Support and coordinate assigned components of annual planning and periodic forecasting across profit and expenses, ensuring alignment with enterprise strategy and business priorities.
- Prepare financial forecasts based on agreed strategic, business, and financial assumptions, working with relevant teams to collect and validate inputs.
- Apply working knowledge of International Financial Reporting Standard 17, local VAS, expense allocation, and investment performance to review and assess forecast outcomes and highlight material inconsistencies or risks.
- Review with budget owners and subject-matter experts the forecast assumptions, reasonableness, dependencies, risks, and mitigating actions for assigned departments.
- Maintain quality control, consistency, and reconciliation between actual results, planning, and management reporting.

4. Strategic and financial alignment, transformation and other responsibilities

- Monitor whether actual spending and financial forecasts of assigned departments remain aligned with the business plan; highlight material gaps, potential risks, and dependencies, and provide analysis to support management decisions.
- Support strategic initiatives and ad hoc management requests.
- Participate in finance transformation, system enhancement, process improvement, and automation initiatives that improve the quality, timeliness, and efficiency of planning and analysis.
- Support implementation and continuous improvement of planning, forecasting, and reporting tools and processes.

Ensure all activities, decisions and deliverables comply with fair treatment of Clients principles, proactively identifying and mitigating risks of unfair client outcomes in line with Company conduct expectations.

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II. QUALIFICATIONS

1. Specialized Knowledge and Skills

- Life insurance financial performance; business, accounting and actuarial drivers; IFRS and local VAS; Underlying Net Income, Reported Net Income, contractual and controllable expenses.
- FP&A, financial modelling, budgeting, forecasting, scenario and sensitivity analysis, performance reporting, management recommendations, and translating strategy and operational plans into financial implications.
- Integrate inputs from Actuarial, Finance Controllership, Investment, Risk and business teams; explain complex financial and actuarial drivers to non-technical stakeholders and leadership.
- Commercial acumen, communication, proactive accountability, continuous improvement; SAP, Concur, Workday, Hyperion and Planview experience is an advantage.
- Curiosity and ability to use artificial intelligence and automation tools responsibly to improve productivity, decision-making and quality of outcomes.

2. Problem Solving

- Apply established policies, planning methods, reporting standards, precedents, scenarios and sensitivities to analyze actual, budget and forecast differences and financial impacts.
- Identify data, assumption, allocation or reconciliation issues; coordinate corrective action, select known methods, seek guidance for ambiguity, escalate material issues and own resolution.

3. Education and Experience

- Bachelor's degree in Actuarial Science, Accounting, Finance, Economics or another relevant quantitative discipline.
- 2-4 years in financial planning and analysis, actuarial, finance, accounting or related fields, with meaningful exposure to life insurance financial performance.
- Knowledge or experience applying International Financial Reporting Standard 17, capital and solvency, and liquidity in an FP&A context.
- Progress toward SOA, IOA, ACCA, CPA, CFA or another relevant actuarial, finance or accounting qualification is preferred but not mandatory.

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