JOB DESCRIPTION (JD)

Sun Life Asia Job Evaluation Process

Date:	August 18, 2026	**Department:**	Strategic Finance
Job title:	**Associate Manager, Financial Planning and Analysis**	**BU/Division:**	Sun Life Vietnam/ Finance
GCF level:	**5.1**	**Career track:**	Professional

Job purpose

Please provide a summary of the purpose and objective of the job.

This role is responsible for supporting the Company's financial planning, forecasting, management reporting, business performance analysis, and expense management activities. The role provides financial insights, monitors performance against financial targets, and partners with business stakeholders to support informed decision-making and effective resource allocation.

Major accountabilities

Identify 5-6 major accountabilities of the job (not the employee). Describe these accountabilities by what is to be accomplished, how and why. Use action verbs to begin each sentence. Avoid the use of acronyms.

1. **Finance Business Partnering and expenses control**
    - Collaborate with cross-functional teams to understand their operational and financial needs.
    - Develop strong relationships with department heads to enhance financial understanding and support decision making
    - Act as Budget Reviewer in Concur, validating budget availability, cost allocation, business rationale, and compliance with company policies before approval routing.
    - Proactive advice on budget utilization, cost control and resource allocation strategies with support from higher level.
    - Take charge of expense optimization initiatives as assigned by Management
    - Partner with Finance Controllership and business stakeholders to ensure timely and accurate expense recognition, accrual review for reporting, budget monitoring and forecasting purposes.
    - Maintain high-quality financial data and expense mapping to ensure consistency across planning, forecasting, reporting, and accounting processes.
    - Perform reconciliation and variance analysis between accounting records and FP&A reporting, including accruals, cost allocations, and project code.

2. **Management Reports and analysis**
    - Monitor and analyze expense performance against budget and forecast, providing insights on key variances, trends, risks, and opportunities.
    - Partner with business leaders to improve cost efficiency and support the achievement of financial targets.
    - Lead monthly internal FP&A expense review meetings and provide actionable recommendations to management on cost performance and mitigation action
    - Develop and enhance management reports, financial dashboards, and analytical tools to support business planning and decision-making.
    - Prepare LT Expenses Monitoring Report, Department expenses reports
    - Conduct deep-dive analysis on expenses, business initiatives, and productivity metrics across channels, functions, cost centers, and projects to identify efficiency opportunities
    - Prepare and maintain management reporting, including KPI dashboards, Regional Office (RO) expense reports, and project reporting (Planview), ensuring timely, accurate.
    - Provide financial analysis and business insights to support strategic initiatives, investment decisions, and management requests.

3. **Planning and forecast:**
    - Proactive work with all department heads to assist and advise how to build department budget within timeline.

- Review / challenge relevant budget owners to make reasonable budget
- Consolidate and prepare master company budget yearly in consistency with actual recording and timely.
- Quality controls and checking of annual planning cycles.
- Deep dive analysis on expense forecast and planning.
- Coordinate with actuarial in DOE analysis and explanation.

4. **Other tasks:**
   - Participate in finance transformation, system enhancement, and process improvement initiatives.
   - Support implementation of improved planning and reporting tools and processes.
   - Participate in adhoc analysis, special projects, and continuous improvement initiatives as assigned.

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.

Specialized knowledge and skills

List specific types of technical or professional skills and knowledge required for the job.

- Demonstrate the Curiosity to effectively leverage AI tools to enhance productivity, decision-making, and quality of outcomes within the role
- Accounting & Finance or Actuarial & Statistical knowledge.
- Proven experience in FP&A, financial modelling, and business analysis
- Strong command of budgeting, forecasting, and performance reporting
- Experience with ERP systems (e.g. SAP, Concur, Workday) and FP&A software (e.g. Hyperion, Planview) is an advantage
- Excellent communication skills with the ability to present to leadership
- Commercial acumen with a strategic, business-partnering approach
- Proactive mindset with a focus on continuous improvement and efficiency

Problem solving

Outline problem solving requirements in terms of how standardized, varied, complex and interdependent problems and issues are typically faced by this job. Provide examples if necessary.

- Demonstrate strong accountability in problem solving by proactively identifying, owning, and resolving all issues within scope, regardless of formal task assignment
- Analyze financial and operational information from multiple sources to identify budget variances, forecast risks, expense trends, and reporting discrepancies.
- Resolve issues within established financial planning, accounting, and reporting frameworks by evaluating alternatives, validating assumptions, and recommending appropriate actions.
- Investigate data inconsistencies, allocation issues, accrual variances, and planning assumptions, escalating matters with significant business impact when required.
- Support decision making by providing fact-based analysis and recommendations to business stakeholders and management.

Education and experience

Indicate the minimum education level and years of relevant experience required to perform the work. Include specific professional designations, licenses, registrations, if applicable.

- Bachelor degree, preferably in Accounting,Finance, Actuarial or Economics major
- Minimum 4 years of relevant experience in Financial Planning & Analysis, Finance, Accounting, or related fields.
- Relevant professional qualifications (e.g., ACCA, CPA, CMA, CFA) are preferred but not mandatory.
- Experience in the insurance or financial services industry is an advantage.
  Strong analytical, problem-solving, and financial modelling skills with the ability to translate data into actionable business insights.

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Communication scope

Identify the level and nature of internal and external contacts with whom this job must interact regularly. Describe the reason and frequency of their communication.

Regular interaction with:

- Budget owners and department heads regarding planning, forecasting, and expense performance.
- Finance Controllership and Finance teams regarding reporting, accounting, and financial controls.
- Senior management regarding financial analysis, performance reporting, and recommendations.
- Regional Office stakeholders regarding planning, reporting, and governance requirements.