



Portfolio CFO

Role Brochure



my finance function



Welcome to My Finance Function

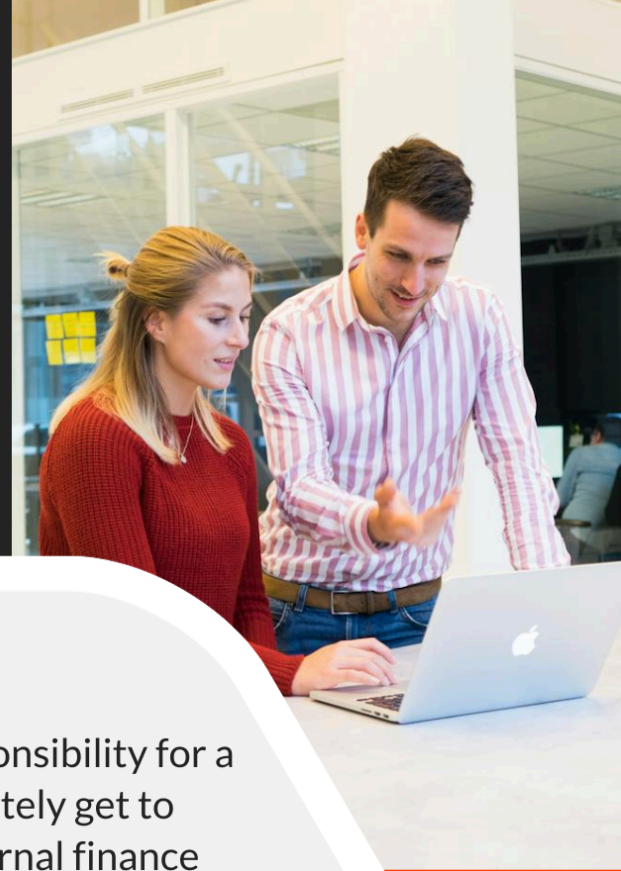
We act as an outsourced finance function for ambitious businesses - giving them access to high-quality financial leadership without the cost of a full in-house team.

Our goal isn't just to report numbers - it's to help business owners make better decisions, faster.

We are blazing a trail in the accountancy industry in the way that we operate, and our primary focus is being a genuinely vital part of our clients' businesses by operating as an extension of their internal team, and working closely with them to provide valuable insight.

We don't operate as a traditional accountancy firm, but our foundations are built upon all of the same qualities.

Day-to-day walkthrough of the role



As a Portfolio CFO, you will have oversight and responsibility for a portfolio of clients, whose businesses you will ultimately get to know inside-out, as if you were heading up their internal finance team.

You will benefit from managing a team of accountants who will deal with the processing of daily operational finance tasks for clients in your portfolio, under your direct supervision. It will be your responsibility to ensure that your clients' accounts are always kept up-to-date, as they will rely on us to do so to enable them to make real-time business decisions.

Each month you will deliver clear, actionable management information to your clients. Importantly you will also own the underlying finance model which is a key component to helping map out each business' finances. You will have the freedom to build out and tailor these in any way that is most useful for each individual business.

Leading regular reviews with clients to discuss their accounts and their general business is essential, and they will ultimately turn to you as their first port of call for any conversations related to the business' finances.

Attention to detail

Confident and personable

Commercial thinking

Candidate profile

This role is designed for an experienced accountant who wants to step into a more commercial, client-facing position, acting as a CFO to multiple businesses.

The ideal candidate will have the skills to improve the overall finance function for businesses, and have the drive to want to deliver the best possible service and advice for our clients to help them grow.

You will have experience preparing management information and the ability to deliver in a way that is understandable and impactful.

Experience working with financial models for all types of businesses - established businesses, growing businesses, and pre-revenue businesses would be highly beneficial.

The ability to communicate clearly and confidently with clients is absolutely essential.

You will take ownership of your responsibilities and consistently deliver high-quality output.



Essential skills & knowledge

- Highly organised with the ability to manage multiple client deadlines and priorities effectively
- Confident communicator, able to build relationships with business owners and act as a trusted advisor
- Hard-working, trustworthy and diligent, must have strong attention to detail and a commitment to delivering accurate work
- Experience in preparing management accounts and operating financial models
- Ability to interpret financial information and translate it into clear, actionable insights for non-finance stakeholders
- Commercially minded, with an understanding of how financial decisions impact business performance and growth
- Tech-proficient – must be confident and comfortable learning and using new software and accounting-related apps

Desired qualifications & experience

- ACA/ACCA qualified with 5+ years' experience within an accountancy practice
- Experience managing a team of accountants
- Experience managing a portfolio of clients having had responsibility for their requirements and deadlines
- Experience working with and building out financial models
- Full UK driving licence

Duties will include



- Oversight and responsibility for a portfolio of clients, orchestrating their operational finance acting as their primary finance contact.
- Delivering timely and insightful management information, tailored to each client's business needs.
- Developing and maintaining financial models to support forecasting and budgeting - either from scratch or improving an already existing model.
- Preparing cash flow forecasts and supporting clients with scenario planning and financial planning.
- Leading regular client meetings to review performance, provide insights, and support business decisions.
- Overseeing the delivery of day-to-day finance processes by the wider team, ensuring accuracy and timeliness.
- Ensuring clients' financial records are complete, accurate, and up to date at all times.
- Reviewing work prepared by junior team members and providing feedback, guidance and development support.
- Identifying opportunities to improve clients' finance processes, systems and reporting.
- Supporting clients with ad-hoc financial analysis and commercial queries as they arise.

Role overview, remuneration & benefits



Contract length:	Permanent
Hours of work:	37.5 hours per week, 8:30am to 5:00pm Monday to Friday
Location of work:	Our head office is based in Nottingham City Centre. Occasional travel to clients' premises will be required
Starting salary:	Salary range £50,000-£60,000 pa depending on experience
Holiday allowance:	Enhanced holiday entitlement of 33 days pa
Other benefits:	Subsidised City Centre parking Company-wide trips to industry events Regular Company-wide team social events Office closure over Christmas period



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The opportunity

We're forward-thinking and innovative; we're not just any old accountancy firm.

Our unique model affords our people the experience of an industry accountant, whilst being underpinned by the support of an ICAEW accountancy practice.

Ready to be part of something different? Let's shape the future of accountancy together.

How to apply

If this sounds like the kind of role you've been looking for, we'd love to hear from you. Please send your CV and cover letter to: info@myfinancefunction.com.

