



## **ROLE DESCRIPTION**

<b>Job Title</b>	Trainee Accountant
<b>Salary Band</b>	24-26
<b>Reporting to</b>	Finance Manager
<b>Directorate</b>	Resources
<b>Service Area and sub area</b>	Finance
<b>Team</b>	Corporate Team
<b>Political Restriction</b>	No

<b>1. Primary Purpose of the Post</b>
<ul style="list-style-type: none"><li>• To be an integral member of the Finance Team, assisting in providing comprehensive financial and accountancy services.</li><li>• This role aims to develop the skills and knowledge required for a successful career in public finance, while contributing to the effective financial management and stewardship of public resources at the Combined Authority.</li><li>• Promote and maintain a culture which places customers first and aims to deliver a high standard of service.</li></ul>
<b>2. Your responsibilities</b>
<ul style="list-style-type: none"><li>• Assist in the delivery of finance system and process improvements, including the use of AI and advances in technology</li><li>• Maintenance of financial information systems, such as:<ul style="list-style-type: none"><li>▪ monitoring of holding accounts</li><li>▪ clearance of suspense accounts</li><li>▪ establishment of new accounting codes and structures</li></ul></li><li>• Assist in the analysis of financial data and modelling to support budgeting, forecasting, and reporting.</li><li>• Assist in the closure of accounts process ensuring compliance with all financial reporting requirements</li><li>• Assist in the preparation of the revenue and capital budgets for a range of services and projects</li><li>• Assist in the production of performance and budgetary control information, and advice to colleagues at all levels</li></ul>



- Assist with the completion of financial returns and preparation of forecast projections and financial appraisals.
- A desire to learn and progress by undertaking training to obtain the necessary skills and knowledge for the role.
- To carry out any other duties which are commensurate with the post

### **3. General Corporate Responsibilities**

- Time and workload management
- Building effective relationships with clients
- Promoting a culture of continuous improvement
- Identifying and applying best practice in how we conduct our business.
- Commercial awareness – keep up to date with developments relevant to our customers.
- Encouraging innovative thinking, in both how we deliver and how our customers deliver.
- Maintaining an up-to-date awareness of developments in relevant regulation and professional requirements (e.g. CPD).
- Commitment to demonstrating the Corporate Behaviours and upholding high ethical standards.

### **4. Recruitment Plan**

Competency Based Interview  
Assessment

## PERSON SPECIFICATION

**Job Title:** Trainee Accountant

Criteria		
Qualifications and Training	E = Essential D = Desirable	Identified By
Part-qualified member of one of the Consultative Committee of Accountancy Bodies (or the Chartered Institute of Management Accountants) <b>or</b> relevant degree <b>or</b> significant experience in Finance	E	A/I
Experience and knowledge	E = Essential D = Desirable	Identified By
Experience of developing and delivering high standards of customer service	E	A/I
Experience of working within a finance office or business support/admin role within a busy office environment	E	A/I
Skills and abilities	E = Essential D = Desirable	Identified By
Good ICT skills, particularly Microsoft Outlook, Word, Excel, and Teams	E	A/I
Strong numeracy and literacy skills (including report writing)	E	A/I
Good interpersonal skills	E	A/I
Ability to take initiative	E	A/I
Ability to self-motivate, organise and prioritise own workloads to meet deadlines	E	A/I
Experience of using a financial ledger system	D	A/I
Personal Attributes	E = Essential D = Desirable	Identified By
Ability to maintain confidentiality	E	A/I
Commitment to professional training to full professional qualification	E	I
Understanding of equal opportunities	E	A/I
Knowledge of the key issues facing the City Region	D	A/I

### Key to Assessment Methods:

I – Interview	A - Application
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