



# Chief Financial Officer

Role Information Pack  
April 2026

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# Welcome

Dear Candidate,

Thank you for your interest in the Chief Finance Officer role at the Association of Taxation Technicians (ATT). Our vision is to remain the leading body for taxation technicians in the United Kingdom, serving the public interest through the pursuit of excellence and integrity. We are seeking a Chief Finance Officer who will elevate our finance function and champion financial management across all areas of ATT's activities and strategic projects. This senior leadership position sits at the heart of our organisation, reporting directly to me.

To help us achieve our vision, we are searching for talented professionals who embody our values and behaviours. We look for those who can inspire others, embrace change, deliver results, and simplify complex challenges. At ATT, our values are central to everything we do:

- **Ethical:** We act with integrity, uphold high ethical standards, and accept accountability for our actions.
- **Collaborative:** We value working constructively with stakeholders to achieve our goals.
- **Inclusive:** We welcome, respect, and value everyone, and actively consider how to be accessible.
- **Empowering:** We encourage and enable personal growth and seize opportunities.
- **Progressive**  
We are future focused; constantly learning and driving improvements that deliver enhanced service excellence.
- **Committed**  
We are focused on and dedicated to the consistent delivery of our charitable objectives and services.

The Chief Finance Officer will shape ATT's financial strategy and ensure robust stewardship of the organisation's resources. They will oversee financial planning and reporting, drive efficiency, and support the Board of trustees in making sound financial decisions. They will also champion the values of ATT by fostering a culture of integrity and collaboration throughout the finance function, while leading initiatives to simplify processes and deliver tangible results for our members and stakeholders.

If you share our commitment to excellence and would like to play a leading role in shaping the future of ATT, we encourage you to apply for this exciting opportunity. We look forward to learning how your experience and approach will help us deliver our mission and vision.

Yours sincerely,

Jane Ashton  
**ATT CEO**



## The Organisation (ATT)

The primary charitable objective of the Association of Taxation Technicians is to promote education and the study of tax administration and practice. One of our key aims is to provide an appropriate qualification for individuals who undertake tax compliance work. Drawing on our members' practical experience and knowledge, we contribute to consultations on the development of the UK tax system and seek to ensure that, for the general public, it is workable and as fair as possible.

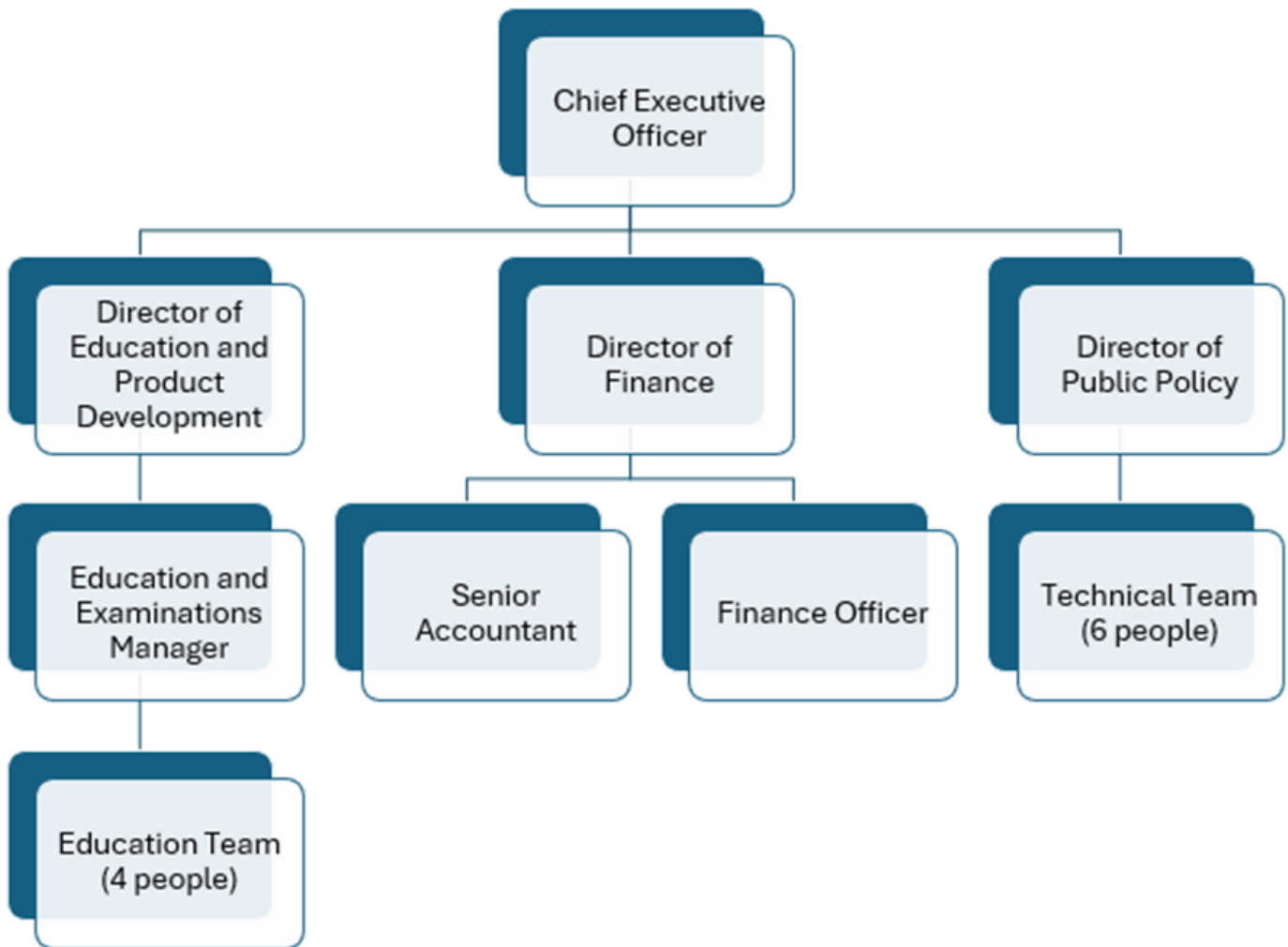
Our members are qualified by examination and practical experience. They commit to the highest standards of professional conduct and ensure that their tax knowledge is constantly kept up to date. Members may be found in private practice, commerce and industry, government, and academia.

The ATT is a registered charity, number 803480, and a regulatory body for the purposes of Anti-Money Laundering supervision of tax practitioners.

The ATT is managed by its Chief Executive under the strategic guidance of the Council.



# Organisation Chart



# Role Description

## Job Purpose

To lead and manage the Finance team and have primary responsibility for.

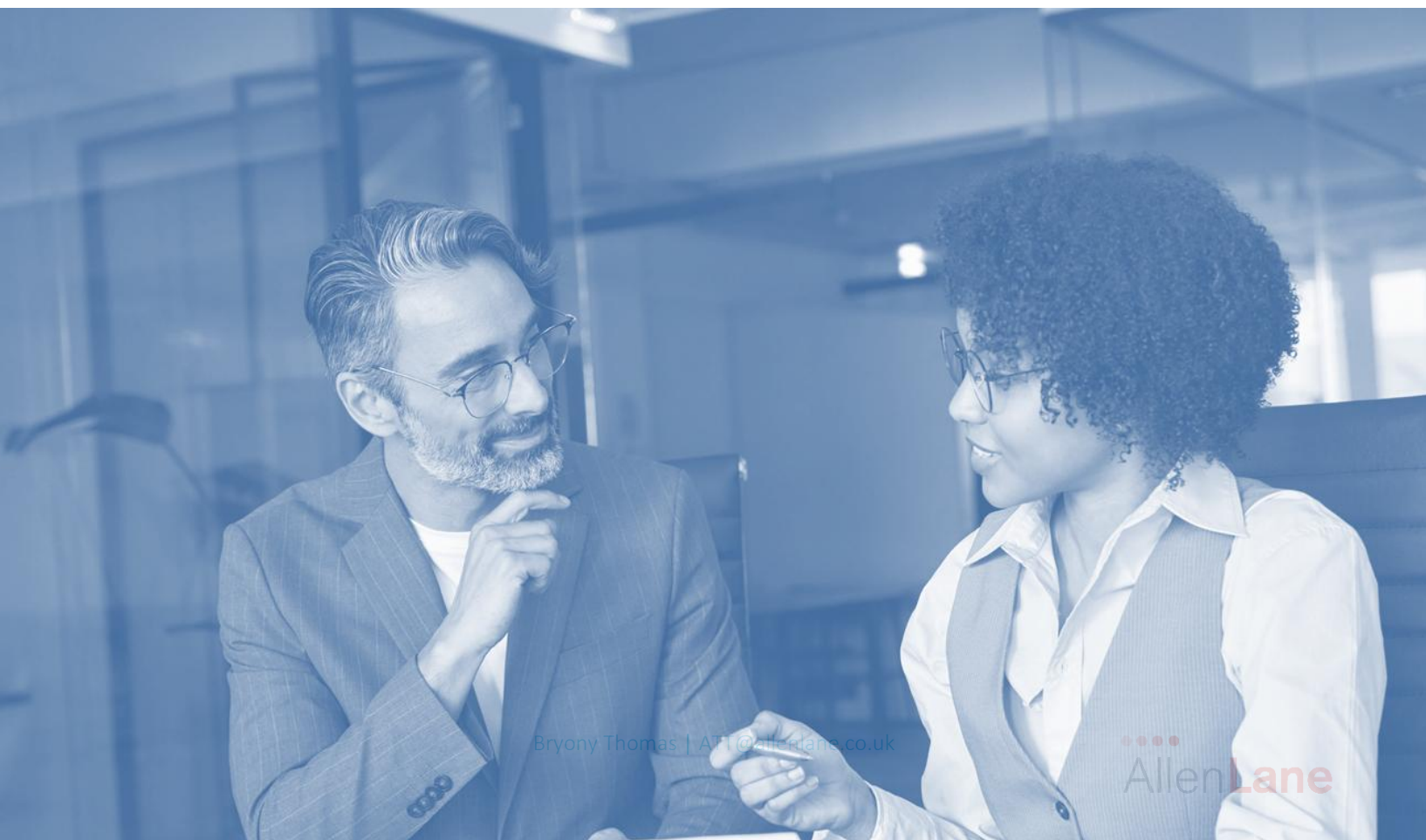
- All statutory and management reporting and transactional accounting services
- Leading and delivering the annual budgeting, forecasting and strategic planning activities.
- Treasury and investment management activities.
- Presenting and successfully managing the approval of budgets and forecasts, as well as financial policies, by the Audit and Risk Committee, the Finance Steering Group and Council.

## Operating Environment

The Finance team provides core financial and accounting services to the departments of ATT and its governance structure. This includes supplier invoice processing and payment, customer collections, cash control, management reporting, statutory reporting and audit. In addition, the CFO looks after investment management, liquidity management, pricing strategy, financial policy, and financial planning.

A member of the senior management team, the CFO will work closely with senior colleagues across the ATT.

The accounting and reporting by the charity is required to comply with the Statement of Recommended Practice (Charities SORP) in applying Financial Reporting Standard 102 (FRS 102).



## Framework and Boundaries

The CFO is responsible for delivering financial management services to the ATTs budget holders, senior management team and governance structure. The services delivered must be of a high standard and delivered to unnegotiable deadlines.

## Key Accountabilities

- Leading the delivery of the financial management and accounting service
- Leading the strategic financial planning
- Responsible for the preparation of the statutory accounts and core financial reporting for Council and committees
- Responsible for the annual budgeting and periodic forecasting processes
- Leading the annual membership subscriptions and fee setting process and consider overall pricing strategy
- Ensuring regular liaison with the Chair of the Finance Steering Group as well as the Chair of Audit & Risk Committee
- Supporting and preparing papers for the Audit & Risk Committee, and Finance Steering Group including oversight of Minutes and following through with actions
- Maintaining good working relationships with key third-parties, auditors, investment managers, bankers, third-party suppliers
- Engaging non-financial managers in the financial management of the ATT, coaching them in the financial implications of their decisions
- Providing advice on financial and legal issues
- Management, development, and support of the Finance team
- Keeping up to date with changes in law and regulation relevant to the ATT, identifying the implications and taking timely action where required
- Initiating debate on new policy areas or where key financial policies need updating
- Responsible for the operation of key controls over the accounting records, notably bank reconciliations and reconciliations between accounting and membership systems
- Ensuring accurate and timely preparation of VAT returns and annual reconciliations both in the UK, India and jurisdictions within the Gulf Cooperation Council.
- Control of cashflows and liquidity management
- Supporting other departments to ensure debt collection is timely
- Authorising supplier and expense payment runs
- Representing the ATT at events and conferences

## Potential Job Impact

The role has primary responsibility for financial stewardship, maintaining the accounting records including the completion of the statutory audit, full regulatory compliance and the provision of timely and accurate management information to the Council and senior management. This will include but not be limited to:

- Driving the financial planning strategy of the company by analysing periodic financial performance and risks.
- Managing short-term and long-term financial reporting including weekly/monthly key performance indicators (KPIs); identifying trends and proactively engaging and advising the Council, Chief Executive, Senior Management Team (SMT) and other staff.
- Delivering timely and accurate monthly management reporting, cash flow reports including departmental reporting, annual financial statements, budgetary control, and project accounting.
- Preparing, presenting and agreeing annual financial budgets with subsequent variance analyses to drive accountability throughout the organisation, with support from the broader finance and accounting resources, for relevant approvals.
- Preparing, presenting and agreeing annual membership subscription and fee proposals for review by Finance Steering Group and approval from Council.
- Creating and maintaining processes and procedures to ensure proper internal controls are documented and enforced.
- Supporting the CEO on annual planning and board reporting, acting as the intermediary between management and Finance Steering Group /Councils on financial matters.
- Supporting both the Director of Education and Director of Public Policy with any commercial developments including due diligence, business case propositions and risk management.
- Leading financial due diligence for large deals, contracts with third parties, master service agreements and any cost sharing agreements with the Chartered Institute of Taxation.
- Ensuring full regulatory compliance including VAT.
- Representing the organisation externally and promoting the ATT's interests and activities.
- Development and deployment of the organisations' financial policies and practices.
- Acting as the key liaison with the auditors, leading the Finance Team through the statutory audit and preparing the annual Financial Statements with auditors.
- Acting as the key liaison on commercial related matters.
- Liaison with investment managers, including writing reports for Finance Steering Group and Councils on financial investment performance.
- Responsible for contracts management with third party suppliers.

# Skills Needed to Fulfil the Role

## Knowledge and experience

- A qualified senior-level financial manager (CIMA, ACCA, ACA, CIPFA).
- An analytical mind and advanced knowledge of financial analysis, planning and forecasting.
- In depth expertise in corporate finance and accounting principles, laws, and best practices.
- Experienced in managing auditor relationships and in preparing year end statutory accounts for a charity to include VAT returns.
- Able to think strategically and be involved in the overall development of the ATT.
- Able to drive change and process improvement.
- Able to make decisions with imperfect information and implement pragmatic solutions.
- Experience in performance management to include developing KPIs.
- Understanding of the need for a service mentality from the finance function.
- Up-to-date and thorough understanding of current financial and reporting requirements, particularly those relating to the charitable sector (Charities SORP & FRS 102).
- Ability and willingness to travel into London for meetings when required.

## Functional/technical skills

- Well-developed communication skills with the ability to explain financial principles and engage with non-financial managers.
- Proficient in use of MS Office 365/MS Office and CRM software – experience of jet reporting desirable but not essential.

## Interpersonal and work management Skills

- Tact and diplomacy. The CFO is part of the senior management team responsible for delivering information and decision making to the governing Council, committees, and volunteers.
- Strong and adaptive interpersonal and communication skills to build effective working relationships and represent the ATT appropriately to external and internal stakeholders.
- Ability to influence and challenge the executive team on key strategic and operational decisions.
- The CFO will need to be a hands-on manager who will provide assured leadership to the Finance team.
- Willing to assume a hands-on role whilst managing and developing the Finance team.
- Ability to drive change.
- Work well under pressure.
- Ability to manage multiple engagements simultaneously.

# Salary & Benefits Package

## Salary

The salary for this role is £54,000 per annum, 21 hours per week. The role is remote, but there will be a need to attend meetings and events, which are mainly held in London. The meeting dates are agreed with our volunteers so it is vital you are flexible and able to attend in person if these fall on your non-working days.

## Pension

You will be automatically enrolled on the Aviva Group Pension Plan (10% employer and 3% employee contribution) upon joining.

## Insurance

- Income protection cover, which provides up to 75% of salary if you are absent due to ill health for more than 13 weeks.
- 24-hour group personal accident scheme providing a sum equal to three times your current salary in the event of your permanent disability/loss of a limb/ death.
- Non-contributory life assurance cover of 4 times your salary.

## Holiday entitlement

- 32 days of annual leave pro-rated (19 days per year for a 21 hour week)



## Optional Benefits

### Bupa (private medical insurance)

You can join our company paid private medical insurance scheme, which pays for the cost of private medical treatment for acute conditions.

### Health Shield Essentials (including Employee Assistance Programme)

You can join our health & benefit programme. We pay the cost for the basic level (including any dependent children). The benefits include the refund of a range of medical costs (dental, optical, physiotherapy, etc) and an employee helpline covering medical and legal issues and counselling.

### Interest-Free Loans

After 6 months' service, you may apply for an interest-free loan to help with the purchase of a season ticket or a bicycle.

### Continuous Professional Development

The Association of Taxation Technicians supports learning and development and offers a wide range of courses and opportunities.



## Guidance Notes for Applicants

Thank you for considering working with us. These notes are designed to help you through our application process. However, if you have any questions regarding the process that are not covered here, please do not hesitate to contact:

Bryony Thomas at Allen Lane

07921 334 625

[ATT@allenlane.co.uk](mailto:ATT@allenlane.co.uk)

Application deadline:	Sunday 24 <sup>th</sup> May
Shortlisting:	Wednesday 29 <sup>th</sup> May
Interviews	2 <sup>nd</sup> and 4 <sup>th</sup> June
Final interviews:	10 <sup>th</sup> June (in person)

You can apply by submitting a covering letter and up-to-date CV via email to [ATT@allenlane.co.uk](mailto:ATT@allenlane.co.uk), as per the email address provided above. Your covering letter should make it clear how your skills and experience match those described in the advert or job description.

If you wish to find out more about the role before applying, you may do so by emailing Bryony or by calling the mobile number provided above. This will not prejudice your application in any way.

If you do not hear from us within 2 weeks of applying, this means that you have not been shortlisted on this occasion. Failure to be shortlisted for one role does not bar you from applying for others when they are advertised. This post will be resourced through a 2-stage interview process, including an assessment.

If you are invited to interview, you must confirm your attendance by the deadline stated in the invitation email. If you do not do so, we will assume you are no longer interested. You will be provided with the assessment details in advance.

If you have a disability and require special arrangements to be made, please notify us as soon as you are shortlisted so we can try to accommodate your needs.

You will be told during the interview when you may expect to hear the outcome.

Although we appreciate the time and effort that goes into applying for a post with us, we do not give individual feedback on applications or interview performance.

Successful candidates will be required to provide their original qualifications, proof of the right to work in the UK and the details of two referees before they commence employment.

We look forward to receiving your application!