

**PERSON SPECIFICATION**  
**Finance Officer**  
**AGE UK PLYMOUTH**

Requirements	Essential	Desirable	How Demonstrated
Qualifications and Training	<input type="checkbox"/> GCSE Grade C or above in English & Mathematics <input type="checkbox"/> AAT qualification or part-qualified. <input type="checkbox"/> Training in Sage or similar accounting software.		<ul style="list-style-type: none"> <li>▪ Application form</li> </ul>
Experience	<input type="checkbox"/> Previous experience in a finance or accounts-based role. <input type="checkbox"/> Experience of processing sales and purchase invoices. <input type="checkbox"/> Experience of handling cash, petty cash and banking. <input type="checkbox"/> Experience of using spreadsheets for data entry and reporting. <input type="checkbox"/> Experience of working with confidential and sensitive information. <input type="checkbox"/> Experience of credit control and debt recovery.	<input type="checkbox"/> Experience of payroll processing or payroll administration. <input type="checkbox"/> Experience of working in the charity or public sector. <input type="checkbox"/> Experience of working with restricted funds, grants or fund tracking. <input type="checkbox"/> Use of Charitylog or other CRM system	<ul style="list-style-type: none"> <li>▪ Application form</li> <li>▪ Interview</li> </ul>
Knowledge and Understanding	<input type="checkbox"/> Good understanding of basic bookkeeping and financial procedures. <input type="checkbox"/> Ability to reconcile bank accounts and financial records. <input type="checkbox"/> Competent IT skills including Microsoft Excel, Word and email. <input type="checkbox"/> Strong numerical accuracy and attention to detail. <input type="checkbox"/> Good organisational skills with the ability to meet deadlines. <input type="checkbox"/> Ability to produce clear financial reports and summaries. <input type="checkbox"/> Ability to communicate clearly and professionally with colleagues, clients and external services. <input type="checkbox"/> Ability to work independently and as part of a team. <input type="checkbox"/> Knowledge of Sage or other accounting software.	<input type="checkbox"/> Understanding of budgeting, forecasting and management accounts. <input type="checkbox"/> Knowledge of charity finance regulations and data protection requirements.	<ul style="list-style-type: none"> <li>▪ Application form</li> <li>▪ Interview</li> </ul>
Personal Attributes	<input type="checkbox"/> High level of integrity and professionalism. <input type="checkbox"/> Honest, reliable and trustworthy. <input type="checkbox"/> Methodical and well organised. <input type="checkbox"/> Flexible and adaptable to changing priorities. <input type="checkbox"/> Calm and professional under pressure. <input type="checkbox"/> Willingness to learn and undertake training.	<input type="checkbox"/>	<ul style="list-style-type: none"> <li>▪ Application form</li> <li>▪ Interview</li> </ul>

	<input type="checkbox"/> Respectful and sensitive when dealing with older people, staff and volunteers.		
Other Requirements	<input type="checkbox"/> Commitment to equal opportunities, confidentiality and data protection. <input type="checkbox"/> Willingness to support charity events and profile-raising activities. <input type="checkbox"/> Understanding of and commitment to Health & Safety requirements.	<input type="checkbox"/> Willingness to occasionally work flexibly to meet business needs.	<ul style="list-style-type: none"> <li>▪ Interview</li> </ul>
Other Relevant Factors	<input type="checkbox"/> DBS disclosure required if successfully appointed <input type="checkbox"/> Full clean driving licence <input type="checkbox"/> A desire to work with and for older people		<ul style="list-style-type: none"> <li>▪ Interview</li> </ul>