



**EduExec Recruitment
Limited**

EER73
MAT Financial Controller
Immediate
Essex

Directed school and MAT finances, including budgets, audits, and financial planning.

Oversaw multi-academy financial operations, including cash flow, funding, and expenditure analysis.

PROFILE

Accomplished Finance Director with over 20 years of diverse experience in the financial sector. Proven expertise in strategic planning, risk management, and regulatory compliance. Demonstrated ability to drive financial growth and stability. Strength: Broad and varied sector experience, enabling effective adaptation to changing financial landscapes.

EMPLOYMENT HISTORY

Multi Academy Trust

Interim Finance Consultant– 3 Month contract

- Assisting and advising new CFO with Finance procedures and practices within the MAT
- Assisting with External Annual Audit
- Checking system procedures are within the DFE guidelines
- Ensuring the current Finance processes are compliant and updating any areas of weakness
- Providing month end and year end processes and preparation of month end reports for Trust Meetings.
- Ensuring Capital Funding allocation of each school is correct and reviewing and analysing capital expenditure.

MAT Finance Implementation Manager

April 2024 – October 2024

- Understand and act on the needs of Support Centres regarding the systems full range of Management Information System (MIS) software products.
- Work to improve accreditation processes to ensure Support Centres are fully qualified to support the systems customers.
- Conduct regular meetings with Support Centres including (but not limited to):
- 1-2-1 support to help them effectively support all schools.
- sharing information on any new products and developments or changes, complimenting any written updates that are released via normal channels e.g. documentation, service changes, outages etc.
- support service review meetings with the Support Manager and manage actions accordingly.
- Review usage of existing schools under Support Centres to drive product utilisation, success and contract renewal.
- Assist with helpdesk tickets as required.
- Gather feedback and provide insights to the Documentation team to continuously improve self-service.
- Work with the wider Success, Community and Customer Care teams to improve effectiveness.
- Meet regularly with relevant sales teams to understand pipeline of customers, new support centre partnerships and the relevant needs.

Finance Director at Large Secondary Academy School

March 2023 — April 2024

As Finance Director, my responsibilities and skills for overseeing the school's financial operations are as follows:

- Directing the budget process and preparing the annual budget.
- Projecting sound financial planning for future years.



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- Monitoring all purchasing/spending and ensuring sound audit procedures.
- Completing and filing all required financial reports and taxes.
- Supervising and coaching the finance staff reporting directly to my position.
 - Administering and controlling school funds.
 - Analysing the school's operations, identifying and implementing strategies to reduce time and money spent on day-to-day school operations.
 - A primary member of the senior leadership team.

This role requires strong financial management skills, strategic planning abilities, and a keen eye for detail. As Finance Director I play a crucial role in maintaining the financial health of the school, making it a pivotal position within the educational institution.

Finance Manager and member of Executive Team. Multi-Academy Trust

November 2021 — March 2023

I was responsible for the line management and development of a team of Finance Officers and Finance Assistant by promoting best practice and ensuring compliance with the financial processes, including but not limited to, cash flow income and expenditure and procedures for 350 staff members providing services for over 3,500 pupils across the Trust. My duties and skills include:

- To maintain integrity of the MAT's financial reports, procedures and practices ensuring they were current and complete. Guaranteeing that the COO, Trust Board's and Academies' decisions were lawful.
- To oversee the administration of the MAT's bank accounts and all academies' funds.
- Preparation of detailed budgets on an annual basis.
- To prepare and assist with internal and external audit.
- To conduct comparative analyses and bench-marking of revenues and expenditures.
- Conducting performance reviews of the central finance team. Setting objectives and monitoring progress of staff and providing training where required.

Company Director – Financial Services

June 2016 – November 2021

Sole director a Mortgage and Protection company, which was FCA directly authorised.

- Compliance and regulation of the company, ensuring that all procedures and requirements were met to a high standard, and to FCA requirements.
- Completing regulatory returns and perform detailed monitoring of the company's performance and budget.
- Providing mortgagee and investment advice on whole of market.
- Preparation of annual accounts.
- Introducing new policies and procedures and implementing them to staff providing full training and ensuring CPD was accurate and to date.
- Leasing with solicitors, lenders and estate agents to ensure mortgage cases progress efficiently whilst managing client expectations.



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Self Employed – Mortgage and protection Adviser

February 2005 – June 2016

- Generating mortgage leads
- Giving advice and recommendations to clients to enable them to make informed choices and providing clients with a full understanding of the mortgage process.
- Preparation of all mortgage and protection related documentation, ensuring that it conforms with all regulatory requirements,
- Attending meetings, training seminars ensuring that CPD and regulatory requirements were met.
- Selecting mortgage and insurance products from whole of market using “Trigold” and “Mortgage Brain” sourcing systems and providing suitable recommendations to suit the client needs.
- Completing mortgage and protection applications and submitting them to third party providers, ensuring all supporting documentation were true and correct and cross-referencing documentation to ensure accuracy.

EDUCATION

Qualifications in finance- Institute of Finance

December 2004 — Present

Full CeMAP and CeRER - Graduated with a distinction honours. Financial services and markets act - Graduated honour

