



POSITION DESCRIPTION – FINANCE MANAGER

1. SECTION A

Employer:	Saunders Robinson Brown (SRB)
Position Title:	Finance Manager
Reporting To:	Chief Operating Officer (COO)
Location:	Christchurch
Direct Reports:	Trust Account Manager, Finance Administrator, Credit Controller, AML Administrator
Functional Relationships:	Internal Professional Staff External Clients External Partners, suppliers (including banking providers) and external advisors

2. SECTION B

2.1 Position Objective

The Finance Manager is responsible for the day-to-day management and execution of the firm's financial operations, ensuring accurate, timely and compliant financial management across all functions. This is a hands-on role supporting the COO by delivering financial reporting, insights and robust financial processes across firm accounts, trust accounts, credit control and AML activities.

2.2 Background

From offices in Christchurch and Rangiora, the experienced team at Saunders Robinson Brown (SRB) provides professional legal advice on commercial and company law, property law, trusts and estates, civil litigation and dispute resolution, family law and employment law. SRB prides itself on their approachable, client-centred culture, and commitment to ensuring an integrated and relationship focused approach throughout the firm.

2.3 Staff Numbers

Principals:	15
Staff:	90 including Principals

3. SECTION C - KEY TASKS AND SPECIFIC ACCOUNTABILITIES

3.1 Management Accounting and Reporting

Provides end-to-end management accounting including all financial reporting, budgeting, cashflow management and forecasting with overall system integrity.

Key Responsibilities:

- (a) Prepare periodic management accounting reports including profit and loss, balance sheet and cashflow.
- (b) Ensure integrity of all financial systems including tax compliance.
- (c) Manage and complete month-end processes and reconciliations and attending to all required tax filings with Inland Revenue (currently GST and FBT).
- (d) Maintain and manage financial and KPI dashboards along with external provider.
- (e) Oversee accounts receivable and payable including billing process, invoice processing, approvals and payment runs.
- (f) Assist where necessary with WIP, debtors, and lock-up processes and ensure reporting is integrated with broader operational workflows.
- (g) Assist with payroll processing/review and ensuring compliance with related legislation.
- (h) Maintain positive relationships with banking providers, and manage access, authority and user controls.
- (i) Ensure effective financial controls and compliance with policies.
- (j) Prepare workpapers and liaise with external accountants for preparation of annual financial statements and tax return(s) for both company and partnership.

3.2 Forecasting, Budgeting and Modelling

Supports firm financial performance through budgeting, profitability analysis, and cashflow forecasting, including scenario modelling to inform decision-making with Principals.

Key Responsibilities:

- (a) Assist with the preparation of annual operating budgets, fee budgets and support charge-out rate reviews.
- (b) Act as a trusted financial advisor to Principals and Practice Group Leaders by providing clear and actionable insights.
- (c) Analyse profitability across firm, practice group, fee earner and client levels.
- (d) Lead cashflow forecasting and scenario modelling, including remuneration review.

3.3 Trust Account Oversight

Oversees trust account operations, compliance with Lawyers and Conveyancers Act Trust Regulations (2008) and other obligations, and continuous improvement.

Key Responsibilities:

- (a) With the support of the Trust Account Manager, oversee the trust account operations and ensure regulatory compliance.
- (b) Collaborate with the Trust Account Supervisor (a Principal within the firm) and the Trust Account Manager to ensure the integrity of, and confidence in, the monthly sign-off of trust account.
- (c) Assist with process and system improvements.

3.4 AML Oversight

Oversee AML compliance, audits, training, and reporting requirements.

Key Responsibilities:

- (a) With the support the AML Administrator, oversee AML processes and compliance obligations.
- (b) Support audits, training and reporting requirements.

3.5 Other Tasks

Carry out other tasks and duties as and when required.

Key Responsibilities:

- (a) Be an active member within the Business Services group.
- (b) Build and maintain excellent internal relationships contributing to SRB's culture and positive working relationships.
- (c) Contribute to the general well-being of the firm.
- (d) Duties are carried out in a timely and accurate manner, and in accordance with SRB's policies and procedures.
- (e) Undertake all other duties that are reasonably requested from time to time.

4. SECTION D

4.1 Qualifications and Experience

- (a) Chartered Accountant (CA ANZ) or equivalent preferred, or equivalent relevant experience in a senior finance role.
- (b) At least five years' experience in finance roles, preferably within legal or professional services sector.

4.2 Skills and Knowledge

- (a) Excellent communicator, both written and verbal.
- (b) Strong financial analysis and modelling capability.
- (c) Advanced Excel, and preferably Power BI, skills.
- (d) High level of accuracy and attention to detail, particularly in financial data and records.
- (e) High level of confidentiality and discretion
- (f) Ability to build working relationships with internal and external clients.
- (g) Ability to translate financials to non-financial lawyers
- (h) Strong organisation, time-management and prioritisation skills.
- (i) Well-developed computer skills (Microsoft Office Suite, Xero, and similar online platforms).

4.3 Personal Attributes

- (a) Hands-on, proactive and commercially minded.
- (b) Curious and proactive learner with continuous improvement mindset.
- (c) Positive, proactive attitude with a willingness to take ownership.
- (d) Determination and perseverance.