



Purpose
ACCOUNTING

Purpose Accounting

Position description
Finance Associate

July 2025

Introduction

Are you looking for an opportunity to demonstrate and develop your financial management leadership and advisory skills?

Do you have a strong sense of social justice and equality?

Purpose Accounting is seeking a Finance Associate to join our team of financial management professionals, serving a diverse range of clients across the non-profit sector.

Our Finance Associates are the key contact and outsourced CFO for a portfolio of non-profit clients, delivering expert advice on strategic and technical financial management issues. The role is a combination of serving a portfolio of ongoing clients, as Outsourced CFO, and some project-based work.

The position is full time (38 hrs per week), although part time (minimum 0.8 FTE) will be considered for the right candidate (in this instance, there is flexibility to work your hours across 4 or 5 days per week, depending on what suits you).

The role would be well suited to candidates based in Sydney, Melbourne, Hobart or Launceston.

Purpose's main office is in Chippendale, Sydney. For Sydney staff, we operate to a hybrid working model - after an initial settling in period, the successful candidate will be required to work 1 day per week in the Chippendale office and remaining time can be worked from home. We also visit our Sydney clients face to face, at their offices.

Where an employee is based outside the greater Sydney region, they will be required to work from home permanently, with regular locally based client visits and some interstate travel expected to provide team collaboration opportunities.

This role reports to a Director.

Who we are

Purpose Accounting is a boutique financial management and advisory company, dedicated to serving the non-profit sector.

Our purpose is to enable a better future, a more just and inclusive society, by serving NFPs to achieve their mission, through sustainable financial management.

Our vision is to empower non-profits to build their capacity and make meaningful decisions for social impact. We do this through informing, collaborating, and leading, to help organisations make great decisions.

Purpose has a proven track record in delivering impactful strategic advice and high-quality financial management services. Our expert knowledge of the non-profit sector covers the technical elements; accounting standards; regulatory requirements; and other legislation that impacts non-profit organisations.

Our top priority is to support our clients to achieve their goals. We form a thorough understanding of our clients' business and we have close, long-lasting relationships.

Purpose turned 10 years old in 2024, and we support a diverse range of clients across the non-profit sector. Our clients are predominantly charities and social enterprises with budgets up to \$10million, in a range of fields such as: homelessness prevention; children's education; new migrant and refugee services; Aboriginal organisations; organisations that support children and youth experiencing poverty or other challenges; and various other causes. This role will work with a diverse range of clients with differing organisation size; accounting complexity; and financial acumen.

As much as possible, we leverage current tech to digitise and automate our client's workflows. Part of our role is to advise and support clients to utilise tech solutions that optimise internal efficiencies, giving them more time to deliver crucial frontline services.

Our people

Our team is a carefully curated mix of financial specialists, with diverse and complementary skill sets. We have a high ratio of CPA / CA qualified team members, from a range of financial and management accounting backgrounds.

With many years' experience serving non-profit clients, our team has a deep appreciation of the social, cultural and political aspects unique to the sector, along with the technical accounting particulars to serving non-profits.

We all share a commitment to and passion for the Sector. Non-profit organisations do an enormous amount of good work addressing social justice issues and they are under constant demand to do ever more. At Purpose we love having a hand in social impact, and we do it by strengthening our clients' financial management and strategy.

We encourage innovation, creative approaches to work and a flexible and inclusive working environment for our team members. We are strongly committed to developing our staff and supporting them to broaden their professional horizons.

We create a highly collegiate and positive environment across the team. We work in teams to serve clients, so relationships across the team are integral. The company also invests in the social fabric, including paying for team lunches each week on office days and hosting whole-of-company training with a social component twice annually.

Equal Opportunity

Purpose Accounting is an equal opportunity employer. We promote diversity of thought, culture and background, and we are committed to creating an inclusive environment for all employees.

We strongly encourage applications from all diverse groups, including but not limited to Aboriginal and Torres Strait Islander peoples; those within the LBGTIQ+ community; and those with disabilities.

About the role

Our Finance Associates are the key contact and outsourced CFO for their clients.

Your main focus will be client service - consultation and advisory services; collaboration; and relationship management. You will deliver expert advice on strategic and technical financial management issues, to support our clients to increase their social impact and financial viability.

You will have significant scope to grow and develop in this role and make it your own, within our Purpose best practice service delivery model.

Purpose works remotely for the most part (i.e. from our office, or from home), however we aim to see our clients in person, where possible and practical.

The role is a combination of ongoing client relationships and project-based work:

Ongoing work

We are engaged through continuous contracts with our ongoing clients. These clients are small-medium non-profits (from \$1 million to \$15 million annual turnover). We are invited into the highest levels of management, including CEO and Board level, so we have a seat at the table as strategic advisors for those organisations.

In this role you will provide services to a portfolio of ongoing clients, acting as both:

- an **outsourced Chief Financial Officer (CFO)** for SME and large non-profit organisations, and
- an **advisor** on financial management and strategy for clients
- the leader of Purpose's overall service, including elements delivered by your accounting and bookkeeping colleagues.

The **outsourced CFO** part of your role will include:

- Independently leading the Finance Function for a portfolio of clients
- Acting as the 'face' of their Finance Function, representing clients at Board meetings and in other executive forums
- Developing close working relationships with the client CEO and other senior management
- Leading colleagues to deliver a range of contracted financial management services for clients. Services include financial reporting; budgeting and forecasting; management of annual audit processes; and financial acquittal processes for grants, accounting and compliance, and bookkeeping services as relevant.
- Supporting in-house Finance Teams, including mentoring and training requirements
- Problem identification and resolution, including managing process and technology change, whilst ensuring minimum disruption to clients' daily business
- Monitoring and managing service delivery to expected commercial outcomes for Purpose, including contract negotiation with the client.

The **advisory** component of your role will include:

- Providing impactful high-level advice on financial strategy. You will be a trusted advisor to your clients.
- Mentoring and developing financial skills in CEOs and Boards
- Identifying potential areas of improvement and proposing opportunities to increase efficiencies and embed best practice amongst clients
- Interpreting legislative and compliance requirements and advising on changes needed

Project work

In addition to ongoing work, you will have the opportunity to consult on project-based work for small-medium, as well as large client-organisations.

Projects range from small scale (2 days' work), through to large scale (10 days' work). They can involve:

- Reviews of Finance Functions and business services;
- Strategic financial forecasting and viability analysis;
- Implementing new systems /technology transitions, where new accounting systems and add-ons would help clients to increase efficiencies
- Re-design of reporting and budgeting processes; and
- Reviewing finance personnel / capacity assessments

In leading projects, your role is to liaise with the client and project team, independently managing deadlines and internal resourcing to deliver outcomes on time, and to a high level of quality.

Internal excellence

You will have a focus on leading continuous improvement and business innovation, and embedding best practice internally. This includes:

- Contributing to the design and implementation of new products/service offerings at Purpose
- Growing your NFP industry-specific, and general technical knowledge, and sharing with colleagues to promote industry learning and high standards of internal excellence

In time you will also have the opportunity to provide guidance to / mentor your colleagues.

Commercial success

This position is responsible for monitoring service delivery against client contracts, including negotiating fees with clients for additional services.

The position also includes assisting with business development work, to secure new contracts or projects.

Initially, a Director will provide support with client negotiations and new business proposals.

The successful candidate will then, over time, be able to generate new business development leads from their own networks/client referrals and negotiate fee outcomes that meet Purpose's commercial objectives.

Your skills and perspective

Essential:

To be successful in this role you will:

- Bring a breadth of financial experience to the role, having served multiple Finance Functions in previous positions, with at least some experience in the not-for-profit sector.

- Have a high level of emotional intelligence and strong interpersonal skills
- Have excellent relationship management and influencing abilities
- Be highly self-motivated and comfortable working autonomously - you demonstrate initiative and seek opportunities to add value. You also have a growth mindset.
- Be personally invested in the non-profit sector – you have a sense of social justice and equality and your personal values align with Purpose Accounting’s direction
- Have strong leadership qualities, influencing skills and decision-making abilities
- Possess high-level communication skills (both verbal and written) and a strong focus on collaboration and consultation. You are effectively able to convey financial information to those with a non-financial background.
- Have an eye for detail and accuracy but also a strategic view – you are equally strong in both areas
- Be familiar and comfortable with industry technology – you have previous experience across a range of accounting and add-on software

Desirable:

We will also favourably view applicants that have:

- Experience within a consulting or practice environment, and/or in serving internal customers
- A background working in diverse environments and with a diverse range of clients
- An understanding of the social/ political/ economic issues that are foundational to the non-profit sector
- Expertise with industry technology – across multiple accounting packages as well as a good grasp of emerging technologies

Qualifications

You are a qualified Accountant (CA/CPA/CIMA).

Legal right to work in Australia

Applicants must have the legal right to work in Australia. If you do not hold Australian citizenship or Permanent Residency, please provide the details of your working visa.

Salary

\$125K+ (plus Super), dependant on skills and experience.

Other benefits

Purpose has operated with highly flexible working from home arrangements pre-COVID, and the COVID period consolidated this approach.

Purpose also offers generous paid leave provisions, above statutory minimums, including:

- Wellbeing and cultural leave (an additional 9 days annually)*
- Birthday leave (1 additional day per year)

**Available for full time employees, after the initial probation period is served*

We are also strongly committed to developing our staff and supporting them. Learning is central to our culture as a firm. Opportunities are available for professional development and career progression, and there is a good deal of scope to make the job your own and carve out your own specialisations within the team. We offer financial support for studies related to professional development, tailored for individual circumstances and as agreed with Purpose Directors.

Additional leave days for study support (for example, for any study relating to CPA requirements – 1 day of leave is available per exam. For other formal study, relevant to an employee's professional development in their position at Purpose, the same policy will generally apply however this is confirmed with your line manager first).