



Finance Business Partner - Developments

Position Outline

Lifestyle
COMMUNITIES

The Lifestyle Story...



2003

James Kelly, Dael Perlov and Bruce Carter developed a business plan

2004

Development of our first community at Brookfield –
Opened in June 2005

2007

Listed on the Australian Stock Exchange

2012

Major capital raising of \$36m

Since beginning Lifestyle Communities in 2003, our mission has always been to enable working, semi-retired and retired people over 50 to enjoy affordable luxury living in a secure community setting, while having the freedom to enjoy new possibilities with greater peace of mind.

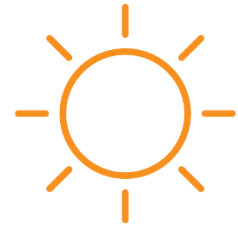
Our first community was at Brookfield in Melton, and over the years we have kept improving on what we do based on the feedback from our customers and homeowners. We have grown the business on two key adages;

1. “You never get a second chance at a first impression” and we ensure that whether it is the look of our communities or the service we deliver, our customers always get a fantastic first impression.
2. “A customer may forget what you told them, but they will never forget how you made them feel”. We want to make every customer touchpoint an amazing experience, one that they will remember and recall with friends and family. We want to ensure that their experience living in a Lifestyle Community is an extremely positive one.

These two adages have been the key enabler of our growth and success over the years and will become even more important as we develop and grow.



Our Purpose



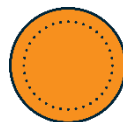
We're champions for facilitating a bigger, more enhanced life for our homeowners. A cohort of like-minded retired, semi-retired and working downsizers who belong to a generation that's seen more change than any before; and possibly any to come.

We **build** communities because our homeowners have worked hard for what they have and they deserve affordable, beautifully-designed and low maintenance homes in concert with best-in-class amenities. We **create** communities because our homeowners haven't given up on returning to a time when they built strong communities around their own homes. We **nurture** the homeowners within our communities because they seek a space that's truly their own, that strikes the perfect balance between connection and privacy; independence and activity.

Like us, our homeowners rail against an earnestly bland existence or disappearing into a sea of sameness; the one-size-fits all approach that places limitations on what's possible. Which is why we actively listen to them; to their hopes for now and their dreams for the future, so the next time they ask, "what's next?" we've already been busy reimagining.

But, most of all, we champion bigger, more enhanced lives for our homeowners because we know that reducing their property footprint takes a giant leap of faith. This is why we believe it's a privilege to walk alongside them as they elevate the next phase of their lives.

Like us, we believe they're just getting started.
After all, they're the generation of change. **And they're not done yet.**



2014

1,000th homeowner
moved in



2016

2,000th homeowner
moved in &
10th Community
Clubhouse opened



2018

Acquired 17th
Community Site &
3,000th homeowner
moved in



2023

Land purchased for
our 31st Community
5,198 homeowners
1340 pets
An ASX top 200
business

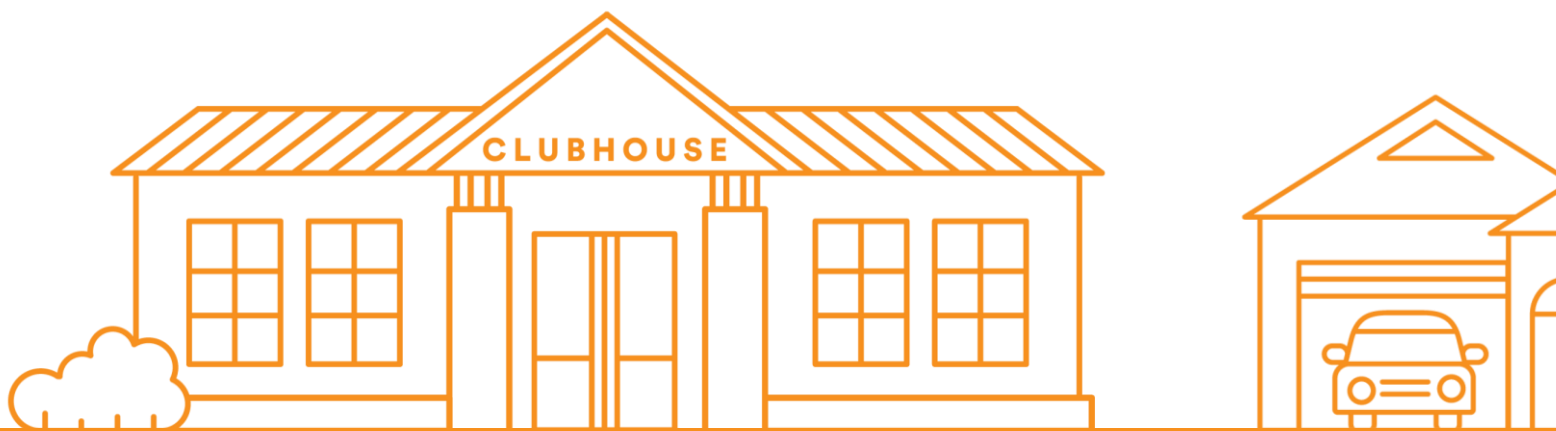
Role Summary

The Finance Business Partner – Developments is responsible for accurate and timely project reporting and analysis to the Executive General Manager, Design and Construction and the project management team.

You will work collaboratively with the Finance team to assist the implementation of process improvements to bring rigour, accuracy and scalability to all Finance touchpoints.

This is a pivotal role which will see you partner with the Design and Construction (Project Management), Sales and Marketing teams to;

- Provide real time support and analysis
- Be a trusted advisor, and
- Add value that will assist decision making



Who Am I?

I am a **passionate** person that really enjoys working in a highly engaged and supportive environment to deliver **amazing** service to our team and customers. I have an absolute **passion** about customer service and believe that delivering amazing customer service should be in every business' ethos.

I have **high empathy** and can put myself in the shoes of team members and our homeowners to understand their needs and how to provide an experience that exceeds their expectations.

I have **high EQ** and my working style is one of **collaboration** and **consultation**. I see this role as both **challenging** and **rewarding**.

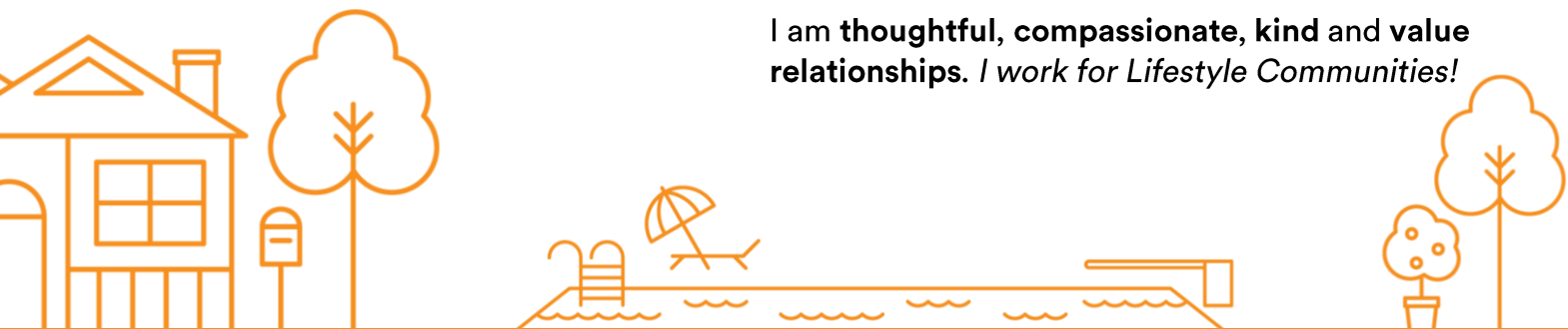
I am eager to grow my skill set whilst at the same time using my experience to achieve and drive results and **make a real difference**.





I continually seek to improve the overall experience for our team members and homeowners. I am excited to **think outside of the box** and constructively challenge the business to be exceptional in all that we do.

I treat everyone with **respect** and show humility in all interactions. I believe that Lifestyle Communities makes a real difference to our customers lives and I work to ensure that I can also make a difference to what we do and the service and product we deliver.

I am **thoughtful, compassionate, kind** and **value relationships**. *I work for Lifestyle Communities!*





Our customer
is our **only truth**

Do it from
the heart

**Own it,
sort it**

Play as
a team

Deliver.
Delight.
Everyday

Be constantly
curious

Our Values

Our values drive all our interactions with our customer.

We know that by living these values we can deliver excellent customer service to all stakeholders and believe that these values differentiate us from other operators in this sector.

POSITION TITLE	Finance Business Partner - Developments
REPORTS TO	Chief Financial Officer
DIRECT REPORTS	NA
LOCATION	Support Office Level 5, 101 Moray Street, South Melbourne VIC 3205 Travel to Lifestyle Communities throughout Victoria, as required.
EMPLOYMENT TYPE	Full Time
DEPARTMENT	Finance
KEY RELATIONSHIPS	
INTERNAL	<ul style="list-style-type: none">✓ Chief Financial Officer✓ Financial Controller✓ Finance Business Partner - Operations✓ EGM, Design and Construction✓ Design and Construction Team✓ Finance Operations Support✓ Finance Operations Officer
EXTERNAL	<ul style="list-style-type: none">✓ Banks✓ Suppliers✓ Auditors

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KEY TASKS / DELIVERABLES

WHAT WILL SUCCESS WILL LOOK LIKE?

REPORTING

- ✓ Month End reporting including (but not limited to):
 - ✓ COGS calculations and stock reconciliations
 - ✓ Expense accruals / prepayment journals
 - ✓ Balance sheet reconciliations
 - ✓ Prepare development reports (PCG) with variance to budget analytics
- Gross Profit analysis

- ✓ Timely and accurate balance sheet reconciliations
- ✓ Operations manager's reporting needs met.
- ✓ JV reporting accurate and timely.

ACCOUNTING

- ✓ Assist with annual budgeting & project forecasting
- ✓ Process new home settlements
- ✓ Process new home deposits
- ✓ Investment property fair value accounting
- ✓ Assist the Finance Controller with half and full year financial reporting
- ✓ Assist with Management Accounting – Operations, Accounts Payable and Payroll cover (when required)
- ✓ Assist the CFO with other projects of work as required
- ✓ You will use a high level of discretion and sensitivity when dealing with confidential or sensitive information
- ✓ Manages resources effectively and assess financial implications
- ✓ You will display high level priority management skills and an ability to prioritise your workload

- ✓ All deadlines met.
- ✓ Reports accurate and timely.
- ✓ Insight provided on operational trends.
- ✓ Settlements and resales reconciled
- ✓ Pro-active resolution of ad-hoc reporting

PROCESS IMPROVEMENTS

- ✓ Work closely with the CFO on improving and streamlining processes within Lifestyle Communities
- ✓ Assist with rolling out new processes and training Lifestyle users
- ✓ Develop procedure documents as required
- ✓ You will display high level strategic thinking with an ability to focus on whole business impacts of decisions
- ✓ Demonstrates the ability to manage change and communicates plans to key people in good time
- ✓ Is commercially aware and consequently able to identify issues both internally and externally which affect the business' performance and confidently expresses to management with conviction and justification
- ✓ Constantly generates new ideas and comes up with creative solutions

- ✓ Processes continually reviewed and improved.
- ✓ Change managed effectively within the Community Management, Marketing, and support office teams.
- ✓ Proactively seeks improvements and displays curiosity

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CUSTOMER SERVICE

- ✓ You have an excellent customer service focus and the ability to interact with people at all levels.
- ✓ You will keep the customer at the forefront of everything that you do.

- ✓ Respectful relationships
- ✓ Pro-active issue management

RELATIONSHIP MANAGEMENT

- ✓ The ability to quickly build rapport and trust with customers and team members
- ✓ Approach will be consultative and collaborative with all key stakeholders
- ✓ Can draw on a wide range of strategies to persuade people in a way that results in agreement of behaviour change
- ✓ Ensures everyone in the team is kept fully informed of operational requirements
- ✓ Has excellent communication skills and the ability to get a message understood clearly by adopting a range of styles, tools, and techniques appropriate to the audience and nature of the information
- ✓ Capable of giving feedback in a helpful and constructive manner
- ✓ Accepts criticism without taking it personally and improves performance as a result
- ✓ Has an extensive knowledge of the industry and its competitors – is externally focused
- ✓ Takes responsibility for problem solving, striving to find solutions
- ✓ Puts the effectiveness of the team above their own personal interests
- ✓ Demonstrates a wider interest in the company
- ✓ It will come as second nature for you to foster and develop relationships with various external stakeholders such as banks, suppliers, auditors & consultants

- ✓ You will be consultative and collaborative with all internal team members.
- ✓ You will be a brand ambassador when communicating with external parties.
- ✓ You will develop a strong working relationship with the Finance Team.



What will *success* feel like for you?

In addition to fulfilling the requirements listed in this position outline, you will be **inspired** and **challenged**, and your learning curve will be steep. You will genuinely believe in the purpose of the business, and you will wake up eager to start the working day where your contributions are valued and rewarded.

THE KEY CHALLENGES OF THIS ROLE:

- ✓ Influence positive change to prepare the business for continued growth.
- ✓ Build strong relationships and explain complex financial concepts to the broader team which has limited financial background.
- ✓ Maintain a customer service attitude whilst ensuring financial processes are robust and policies are implemented effectively.

OUR ASK OF YOU

?

We have a strong history up to today and we need passionate, motivated and entrepreneurial team members to challenge the status quo.

By joining the Lifestyle Communities team, you are committing to give it your all, live our values, take some risk and make a difference.
That is all we ask.

I understand the key deliverables and values of Lifestyle Communities, and will execute my role as **Finance Business Partner - Developments** to reflect this position outline.

Signature