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# *Finance Systems Accountant*

**Position Outline**



# 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.

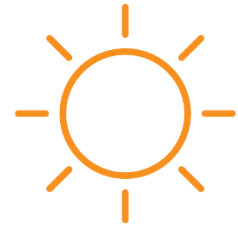
Our first community was at Brookfield in Melton, and over the years we have kept improving on what we do based on the feedback from our customers and homeowners. We have grown the business on two key adages;

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



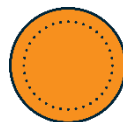
We're champions for facilitating a bigger, more enhanced life for our homeowners. A cohort of like-minded retired, semi-retired and working downsizers who belong to a generation that's seen more change than any before; and possibly any to come.

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**

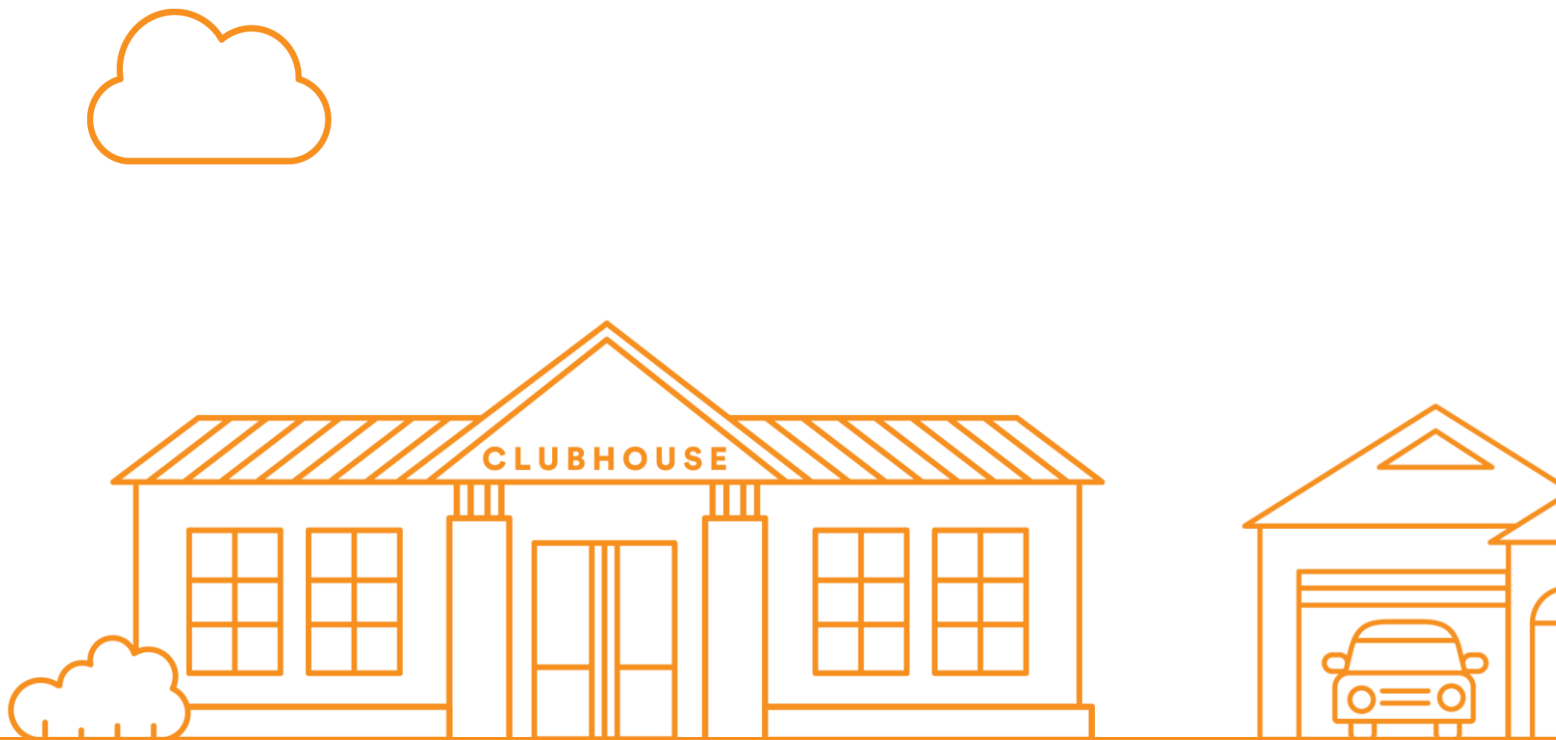
Land purchased for  
our 31<sup>st</sup> Community  
5,198 homeowners  
1340 pets  
An ASX top 200  
business

# Role Summary

Our Finance Systems Accountant position offers a finance professional the chance to build their skills in an ASX 200 company.

You will gain exposure to accounts payable, transactional banking, payroll and assist with journals, balance sheet reconciliations, cash management, GST, Tax, Audit and internal controls.

You will engage with all teams across the business and require strong communication and relationship building skills



# 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**.

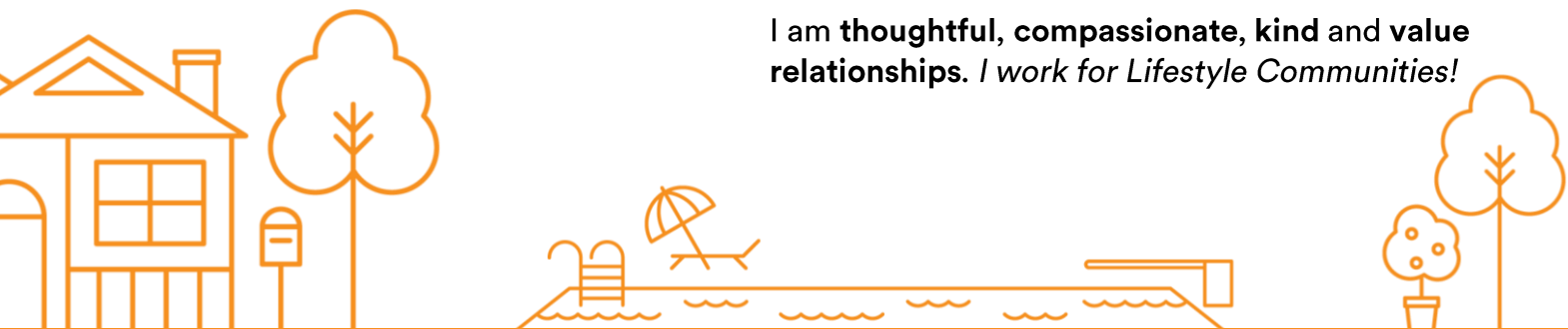
I am eager to grow my skill set whilst at the same time using my experience to achieve and drive results and **make a real difference**.





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 Systems Accountant
REPORTS TO	Finance Business Partner (Operations)
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"><li>✓ CFO</li><li>✓ Financial Controller</li><li>✓ Finance Business Partner – Development</li><li>✓ Finance Operations</li><li>✓ Sales Team</li><li>✓ Design &amp; Construction Team</li><li>✓ Experience Team</li><li>✓ Marketing Team</li><li>✓ People Experience Team</li></ul>
EXTERNAL	<ul style="list-style-type: none"><li>✓ DXC</li><li>✓ Consultants</li></ul>

# Finance Systems Accountant

## KEY TASKS / DELIVERABLES

## WHAT WILL SUCCESS WILL LOOK LIKE?

### ERP Systems

- ✓ Complete all system administration requirements (testing, managing user profiles, workflows, chart of accounts, database cleansing)
- ✓ Manage system improvements and upgrades as required
- ✓ Manage system errors and integration issues as required, undertaking root cause analysis to prevent future occurrence
- ✓ Work with consultants to optimise the system to suit Lifestyle Communities
- ✓ Maintain user guides and provide training to Lifestyle employees
- ✓ Analyse processes to determine areas for improvement and develop a plan for implementation
- ✓ Adhoc systems tasks

- ✓ System administration is current and optimised for Lifestyle Communities
- ✓ System issues are resolved in a timely manner
- ✓ User guides are up to date
- ✓ New starters have been trained on the ERP system within 4 weeks of start date

### Reporting

- ✓ Enhance reporting capability across current suite (P2P, management reports, statutory reports) by utilising business intelligence
- ✓ Work with business stakeholders to understand reporting gaps and develop reporting to meet the needs of stakeholders

- ✓ Increase in reporting accuracy, timeliness and efficiency
- ✓ New reporting capability implemented

### Accounting & Operations

- ✓ Act as a back up for payroll, rent runs, accounts payable
- ✓ Prepare and post monthly expense accrual journals
- ✓ Prepare and post prepayment journals
- ✓ Assist with preparation of balance sheet reconciliations
- ✓ Contribute to finance projects as required

- ✓ Journals are posted by the required deadline
- ✓ Balance sheet reconciliations are prepared and reconciling items are resolved in a timely manner
- ✓ Finance projects are successfully executed

### Compliance & Governance

- ✓ Assist with compliance activities including Income Tax, GST, FBT, payroll tax complexities specific to Lifestyle Communities
- ✓ Assist with implementation, monitoring and continuous improvement of internal controls

- ✓ You will proactively support the compliance requirements of the business



# Finance Systems Accountant

## Relationship Management

- ✓ Positive and constructive approach to building relationships (internal & external)
- ✓ Proactive and solution based approach in meetings

- ✓ Foster a pragmatic but functional control environment and look for ways to continuously improve process to manage risk whilst achieving business objectives

- ✓ 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:

- ✓ Open and honest communications
- ✓ Self-awareness – be prepared to admit when you don't know how to do something
- ✓ Have a go attitude
- ✓ Self-starter - Be prepared to put in extra effort to learn the skills required

# OUR ASK OF YOU

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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 Systems Accountant** to reflect this position outline.

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Signature