

Position Title:	Director of Finance	FLSA Status:	Exempt
Department:	Finance	Status:	Full-time
Reports to:	Director of Operations	Date:	June 2018
Position Category:	Strategic/Mission		

SUMMARY

The Director of Finance will provide leadership, planning and organization of the Firm's overall accounting and financial practices to assist the Firm in attaining our operational and financial goals. Serve as a member of the Firm's Management Team reporting to the Director of Operations. This position provides overall supervision of the Firm Finance department.

A successful Director- Finance will carry out the principal accountabilities of the position while supporting the vision and intent of The Schenck Way.

PRINCIPAL ACCOUNTABILITIES

- ENGAGED WORKFORCE**
- ▶ Support our intentional culture and be a standard bearer for The Schenck Way with both fellow team members and clients.
 - ▶ Engage in continual self-development and lifelong learning.
 - ▶ Contribute positively to a collaborative team environment across the firm.
 - ▶ Encourage and directly support the development of other team members.
 - ▶ Recruit, train, supervise and evaluate finance department staff.

- SERVICE EXCELLENCE**
- ▶ Primary day-to-day responsibility for planning, implementing, managing and controlling all financial-related activities of the Firm including budgeting, accounting (including the practice management system), financial reporting, cash management, taxes, internal controls, banking, professional liability and general business insurance, and implementation of shareholder compensation and benefits programs
 - ▶ Collaborate with the People Team to select and monitor team member insurance programs
 - ▶ Assist departments in establishing and monitoring dashboard reports and controls to help the firm achieve its WIGs (Wildly Important Goals)
 - ▶ Work closely with IT to create customized dashboard reports and high level information
 - ▶ Support Operations leadership team to initiate, evaluate and implement Firm policies and procedures, strive for short-term operating cost savings, develop strategies and implementation plans for long term operational improvements while maintaining an appropriate level of Firm risk management
 - ▶ Work closely with CIO/CTO and DOO to prepare cost/benefit evaluation of proposed IT initiatives and subsequent implementation to maximize efficiency of adoption and achievement of projected benefits
 - ▶ Complete special projects as directed by the Board of Directors, DOO and key firm wide committees
 - ▶ Review contracts such as Asset Purchase Agreement, Leases, and Engagements for accuracy and validity
 - ▶ Coordinate all legal matters, including defense against potential malpractice claims, working closely with legal counsel, insurance advisors, and appropriate firm technical experts
 - ▶ Assist the Director of Quality Control with contract review (non-disclosure agreements, special engagement letters, purchase contracts, etc.) for appropriate wording, seeking advice from legal counsel as needed

POSITION DESCRIPTION:

- ▶ Serve as the Treasurer of the Firm and related entities
- ▶ Perform complex calculations for deferred compensation, budgets, revenue and salary, and shareholder compensation

INNOVATION AND OPTIMIZATION

- ▶ Provide effective recommendations and financial analysis in the development and implementation of Firm strategic initiatives
- ▶ Working with the Firm Management Team and BUPICs, develop annual operating plan, regularly report progress thereon, investigate variations and provide recommendations for improvement
- ▶ Participate in initiation and evaluation of potential new business opportunities including Mergers & Acquisitions
- ▶ Participate in evaluation of merger/divestiture candidates and participate in integration upon closing of transaction

SUCCESS MEASURES

...For future development

QUALIFICATIONS

To perform this position successfully, an individual must demonstrate regular, predictable attendance and be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge and skill required. The individual must be able to successfully pass background checks.

EDUCATION CERTIFICATION LICENSURE

- ▶ Bachelor's Degree in Accounting or Finance
- ▶ CPA License
- ▶ JD, a plus

EXPERIENCE REQUIRED

- ▶ 10+ years of previous related experience in a service industry, preferably in a public accounting firm

KNOWLEDGE AND SKILLS REQUIRED

- ▶ Strong analytical, financial, planning, reporting and technical knowledge and skills
- ▶ Hands-on complex calculations experience
- ▶ Excellent verbal, written and interpersonal skills
- ▶ Attention to detail, and the ability to work successfully and effectively with cross-functional teams
- ▶ High level knowledge experience Microsoft Office Products including MS Project
- ▶ Experience with STAR Software a plus
- ▶ Experience with Four Disciplines of Execution (4DX) a plus

PHYSICAL REQUIREMENTS

To accomplish the essential functions of the position, one must be physically able to operate or work with computers, calculators, reference books, computer software applications, phones, and other standard office equipment. The physical activities of the position include talking, reaching, grasping, light lifting, bending, squatting, and other repetitive motions.

WORKING CONDITIONS

- ▶ Work is considered sedentary and performed mainly in a pleasant office environment with rare exposure to environmental factors
- ▶ Minimal safety hazards with general office working conditions
- ▶ Travel up to 20%

CONTACTS

Position has frequent contact with all levels of team members, government agencies, professional groups, bank associates, insurance brokers, legal advisors and consultants.

INTENT AND FUNCTION OF POSITION DESCRIPTIONS

This position description is intended to cover the most significant aspects of the position. There may be additional responsibilities assigned beyond those stated in this position description. The Firm reserves the right to modify the role, responsibilities, requirements and position status as compliance regulations or business needs dictate.

POSITION DESCRIPTION:

Position descriptions assist the company in assuring the hiring process is administered fairly and qualified candidates are selected. They are essential to effective performance management and compensation systems.

In accordance with the Americans with Disabilities Act, it is possible that requirements may be modified to reasonably accommodate disabled individuals. However, no accommodations will be made which may pose serious health or safety risks to the team member or others or which would impose undue hardship on the Firm. Position descriptions are not intended as and do not create employment contracts. The Firm maintains its status as an at-will employer and employment separations can occur for any reason not prohibited by law.