

KRAUSE FINANCIAL SERVICES

About Us

Krause Financial Services is a pioneering, attorney-led financial services firm that specializes in crisis Medicaid planning through Medicaid Compliant Annuities and other insurance products. With over 30 years of experience, we work with elder law attorneys and their clients to accelerate eligibility for benefits and provide relief from the financial hardship of long-term care. To learn more, visit our website at www.medicaidannuity.com.

We are seeking a **Financial Controller** to maintain consistent corporate finance strategy through a range of avenues such as managing and allocating accounts, financial statements, tax data, sales figures, and others. The position will require a proven track record of success in a financial, business analyst, and/or accounting role with managerial experience. The person filling this role will need to be forward-thinking and demonstrate exceptional attention to detail. The ideal fit will have an aptitude for strategic planning and demonstrate leadership qualities.

Key Responsibilities

- Financial analysis - Provide proactive recommendations to leadership/ownership based on a thorough financial analysis focused on improving the performance of the organization. (35% of time)
- Financial Management - Manage all financial aspects of the business including metrics of monthly and annual closings. (25% of time)
- Communication with Leadership/Ownership - Proactively communicate with leadership and owners on the financial health of the business and recommendations to improve it. (10% of time)
- Strategic & Department Planning - Be a contributing member of the leadership, planning a department teams/budgeting. (10% of time)
- Benefit and insurance management and administration. (10% of time)
- Manage External Relationships - Identify, recommend and manage all outside partners/vendors necessary to lead the organization and execute the plan. (5% of time)
- Team/Talent Development - Build a high-performance team through consistent development and accountability. (5% of time)

Job Duties

- Maintain, update, and oversee bookkeeping practices carried out by the Company's Accounts Administrator utilizing QuickBooks.
- Coordinate with executive, leadership, and management teams in the development of Company-wide and departmental budgets.
- Develop and maintain expense reporting practices.
- Provide forward-looking financial insight on company initiatives, including marketing campaigns, sales campaigns, business valuation, product and service pricing, and M&A.
- Coordinate, oversee, and direct corporate finance initiatives such as obtaining lines of credit and managing repayment obligations.
- Serve as a liaison with banks, vendors, and other corporate partners.
- Assist with tax planning and reporting.
- Provide profitability and trend analysis.
- Assist in cash flow management.
- Generate detailed financial reports.
- Any additional corporate finance tasks as assigned.

Desired Leadership Characteristics & Skills

- Accountability for results
- Results through people
- Authority
- Risks
- Self-Management
- Personal Accountability
- Interpersonal Skills

Position Requirements

- 4 Year degree in Accounting or Finance or other relevant field (MBA and/or CPA a plus)
- 5+ years of experience with Corporate Accounting and Finance
- Experience with full Microsoft Office suite including Outlook, Word, Excel, and PowerPoint required.
- Salesforce CRM Experience preferred
- Experience with Quickbooks preferred
- Insurance Industry Experience preferred
- M&A Experience preferred