



Chief Financial Officer Job Description

May 2024

The Chief Financial Officer (CFO) serves as the Lead for Capital Access finance, accounting, contract management, and administration functions. The CFO is a member of the Management Team who leads financial analysis, strategy, and production support.

Established in 1995 and based in Philadelphia, Capital Access serves as a consulting and program management firm in housing and community development and energy retrofit programs. Capital Access integrates policy, project, compliance, construction, and financial management to improve the quality and affordability of housing and economic opportunity for lower-income communities. Since 2000, the U.S. Department of Housing and Urban Development has engaged Capital Access as a national Technical Assistance provider.

Capital Access provides direct program management services on our Capital Access Project, Grants and Expenditure Management platform (CAPGEMS). The CFO will play an integral role in production modeling, financial systems, and internal controls for expansion of CAPGEMS direct program management. Please see www.capitalaccessinc.com for details. The ideal candidate embraces our core values to be:

- Proactive
- Discerning
- Integrity-Driven
- Collaborative
- Innovative
- Kind
- Accountable

You may be a great fit for this role if ...

- You take joy in optimizing financial strategy and management systems.
- You embrace the challenge to balance the disciplines of financial management and quality control with the sense of enterprise for an entrepreneurial firm.
- You excel at building and optimizing systems for analysis, strategy, production, and reporting to support performance and profitability.
- You are an organized with excellent writing and verbal communication skills.
- You have the integrity and collaboration skills to work remotely as part of a team.
- You excel at cultivating staff to help them build skills, expertise, and confidence.
- You are passionate about helping communities heal and thrive.

Responsibilities

The Capital Access Chief Financial Officer manages and optimizes:

1. Financial, accounting, administration and human resources systems and staff. CFO updates policies, processes, and systems, and provides training and support for staff. CFO prepares financial data for compliance reports, tax returns, and audits.
2. Production and profitability modeling, reporting and support team to achieve production, impact, and profit goals in service to our "do good and do well" mission and
3. Research, analyze, strategize, and support high impact and profitable new business.

Helping communities thrive.

Required Qualifications

- Demonstrated experience, skills, and proficiency with:
 - ◆ QuickBooks Online, QuickBooks Payroll and QuickBooks Time suite of programs
 - ◆ Excel, Smartsheet and related applications for production models, analysis, database, and report generation
- 5 years experience leading CFO functions in private, non-profit, and/or public entities.
- Experience with financial and compliance management of government housing, and community development and energy efficiency programs, including 2 CFR Part 200.
- Embrace processes and accountability tools of the [Entrepreneur's Operating System](#).
- Excellent organizational, time management, and communication skills.
- Ability to work collaboratively and build trust with both clients and colleagues.
- Strong sense of integrity and proven ability to maintain discretion and confidentiality.
- Ability to anticipate needs and potential problems, approach them with a positive problem-solving mindset, and communicate with the Management Team.

Employment Terms

- This is an at-will, exempt, professional full-time professional employee position.
- Compensation is set to align with experience and expertise. The position is eligible for periodic bonuses based on performance and overall profitability of the firm.
- The position is eligible for health, dental, and vision insurance and retirement plan.

Work Environment

Capital Access is a remote company. The CEO and COO are based in Philadelphia. This position may involve some periodic travel.

Contact

Candidates with the above skills and experience are encouraged to your resume, cover letter and two references to recruitment@capitalaccessinc.com and jn@capitalaccessinc.com.

All duties and responsibilities listed are essential job functions and requirements and are subject to possible modification to reasonably accommodate individuals with disabilities. The omission of specific statements of duties does not exclude them from the position if the work is similar, related, or logical assignment to the position.

Capital Access is an Equal Opportunity Employer. Candidates will be considered regardless of race, color, religion, sex, national origin, age, sexual orientation, protected genetic information, status as a parent, lawful political affiliation, marital status, physical/mental disability (beyond what is required for successful job performance), membership or non-membership in an employee organization, or any other non-merit factor.

Hiring is contingent upon satisfactory results of employment and background verification. This job description does not constitute an employment agreement and is subject to change by the employer as the needs of the business and requirement of the job change. Capital Access reserves the option to request more information as needed.

Thank you for your interest in Capital Access!