

# KOPPLIN KUEBLER & WALLACE

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## **DIRECTOR OF FINANCE PROFILE: KELLY GREENS GOLF & COUNTRY CLUB FORT MYERS, FL**

### **DIRECTOR OF FINANCE OPPORTUNITY AT KELLY GREENS GOLF & COUNTRY CLUB**

An exciting opportunity exists at Kelly Greens Golf & Country Club for a fiery, forward-thinking, finance professional who would enjoy partnering with a General Manager/COO as the Club goes forward with a full clubhouse remodel, restoration, and modernization, as well as the development/implementation of a 3-5 year strategic plan. This role is one of the main positions on the Executive team, serving as a partner, thought leader, and advisor in all club financial matters to the GM/COO, Department Heads, finance committee, and Board of Directors. The Club seeks a collaborative, "financial wizard." A fun perk of the position will be enjoying the brand new finance/accounting offices when completed.

[Click here to view a brief video about this opportunity.](#)

### **ABOUT KELLY GREENS GOLF & COUNTRY CLUB AND COMMUNITY**

Kelly Greens Golf & Country Club is a private, bundled community in Fort Myers, Florida, close to the Gulf beaches and Sanibel-Captiva Island. The private gated community began development in 1987 and currently consists of 939 residences, including single-family homes and various condominium models. Kelly Greens is a bundled community and, therefore, financially sound. Fort Myers Beach is known for its sugary white sand beaches along the Gulf of Mexico.

Kelly Greens offers a variety of home choices to fit different lifestyles. Within a short distance of the community gates are many restaurants, bars, shopping, and wildlife preserves.

The centerpiece of Kelly Greens is an 18-hole Par 72 championship golf course designed by architect Gordon Lewis. The Bermuda grass golf course challenges golfers at all skill levels. Eight sets of tees modify the course length from 4,455 to 7,028 yards. Facilities include a full practice range with over 20 grass-hitting stations, an extensive short-game practice area, and a 9,000-square-foot putting green, all maintained exactly like the golf course. Facilities include a full practice range, an extensive short practice area, and 9,000 square foot putting green. 86% of the homes within Kelly Greens have a view of the Audubon-certified golf course and its many lakes.

Racquet sports are popular at Kelly Greens, which has top-class clay tennis courts near the clubhouse and many hard tennis courts throughout the community. In addition to golf and racquet sports, all members have access to a variety of common recreational and social amenities, including a full-service restaurant, a lounge, patio dining, a swimming pool, and facilities for club activities and exercise.

### **KELLY GREENS GOLF & COUNTRY CLUB BY THE NUMBERS:**

- 939 members in all categories
- \$7,250 Initiation fee
- \$8,236 Annual dues
- Gross Volume: \$10M
- Annual Dues Volume Approximately: \$6.5M
- Gross Payroll Approximately: \$953K
- 40,000 – 45,000 – Rounds of Golf
- 50 FTE Employees – 60 Seasonal Employees

- 9 Board members, each serving three-year terms
- Club POS System is Jonas
- Payroll System: ADP
- Membership Average Age: 69
- Kelly Greens Master Association INC. is registered in the state of Florida under Chapter 617, corporations not for profit.
- Federal tax form 1120, not for profit, not tax exempt. Club operates under the Florida Statute 720, Homeowners Associations

**KELLY GREENS GOLF & COUNTRY CLUB WEBSITE:** [www.kellygreens.com](http://www.kellygreens.com)

## **DIRECTOR OF FINANCE - POSITION OVERVIEW**

The Director of Finance is a senior management position responsible for guiding and directing the Club's financial operations. This role oversees all aspects of accounting and ensures compliance with generally accepted accounting principles. Reporting directly to the General Manager, the Director of Finance interfaces with the Treasurer, Board of Directors, Finance & Audit Committee, and Department Heads. The Director of Finance (DOF) of Kelly Greens Golf & Country Club holds full accountability and direction of fiscal operations of the Club that include, but are not limited to, financial reporting, forecasting, auditing functions, compliance for financial, treasury management recordkeeping, financial policies and procedures, adherence to GAAP and legal requirements.

### **KEY PRIORITIES FOR SUCCESSFUL CANDIDATE:**

#### **FINANCIAL MANAGEMENT AND OVERSIGHT**

- Collaborate with the General Manager and Department Managers to develop and manage operating budgets and capital/reserve budgets.
- Coordinate and review all accounting activities, including accounts payable, accounts receivable, general ledger, trial balance, journal entries, bank reconciliations, payroll, accrued expenses, fixed assets, balance sheet, and cash flow.
- Manage cash flow schedules and conduct timely and accurate preparation of monthly financial statements and reporting packages, including detailed department analysis and budget variance explanations.
- Acts as point of contact for club bank, club auditors, insurance broker, employee benefits provider, IT, reserve study provider, and anything else deemed by the General Manager/COO.
- Oversee payroll processing and review of payroll register for exceptions
- Assist the General Manager in negotiation, adequacy, and maintenance of the Association's insurance policies.
- Ensure compliance and filings with all federal, state, and local taxing authorities.
- Maintains long-term capital project schedules, files, budgets, costing and payouts, and statutory reserve fund.
- Provide financial insights for long-range planning and guidance to improve results.
- Monitor and reconcile financial activities of special projects and prepare necessary reports.
- Report to the Finance Committee monthly and assist the Treasurer in preparing a report for the Annual Membership Meeting.
- Attends all board meetings, risk management meetings, and all other committee meetings deemed appropriate by GM.

#### **ACCOUNTING AND COMPLIANCE**

- Coordinate with external auditors for annual audits
- Oversee departmental monthly inventories.
- Maintains knowledge of Club trends in economic processes and procedures.
- Ensures that the Club's financial standards, methods, and operations are compliant and current with all local, state, and federal agencies.
- Recommend enhancements to processes and financial policies.

- Maintains Accounting Department procedure manual.
- Reconciles all bank account statements for month-to-month accuracy of bank activity that serves as part of the internal audit function.
- Oversee and comply with record retention policies.

#### **MEMBER AND VENDOR RELATIONS**

- Oversee member billing and collections. Ensures that the Club's financial standards, methods, and operations are compliant and current with all local, state, and federal agencies.
- Reviews and recommends vendor and utility services, provisions, and contracts.
- Develops and maintains quality control and operational procedures for staff and department operations.
- Manages and develops Accounting staff for timely and accurate payment applications, statement production, receivable payments, member inquiries, and report writing

#### **TECHNOLOGY AND PROCESS IMPROVEMENT**

- Oversee IT and recommend enhancements for improved technological infrastructure and systems.

#### **CANDIDATE QUALIFICATIONS**

- Five to seven years of professional accounting experience, with at least three to five years as the Controller or equivalent position, preferably in a private club or association setting.
- Long-range planning and financial planning in the Club industry or a transferable industry, including reserves studies.
- Effective responsiveness in verbal and written communication skills.
- At least intermediate experience with Word, Excel, PowerPoint, POS, and industry-specific software is necessary.
- Demonstrated leadership ability for staff management and planning for staff development.
- Ability to strategize short- and long-term planning to achieve the Club's financial goals.
- Exhibits a positive attitude with members, management, and staff.
- Demonstrates continued departmental improvement initiatives.
- Support Club policies and procedures and be open to contributing to new or improved methods of operation.
- Possess organizational skills to support efficient production.
- Maintains affiliations in appropriate professional associations to remain current in the profession.
- Participation in appropriate industry educational seminars and workshops/conferences to increase knowledge of trends, best practices, and IT applications for Club and financial operations, enhance skills overall, and establish networking contacts.

#### **EDUCATIONAL AND CERTIFICATION QUALIFICATIONS**

- Bachelor's degree in finance and/or accounting preferred but not required.
- CPA accreditation is a plus or the equivalent of a proven 15 years of progressive experience in a financial management position that demonstrates primary functions, responsibilities, and qualifications.
- CHAE certification is a plus.
- CAM license is a plus.

#### **SALARY AND BENEFITS**

Salary is open and commensurate with qualifications and experience. The club offers an excellent performance bonus and benefits package, including HFTP membership and professional development.

#### **INSTRUCTIONS ON HOW TO APPLY**

Please upload your resume and cover letter in that order using the link below. You should have your documents fully prepared to attach when prompted during the online application process. Please be sure your image is not on your resume or cover letter. However, you must have your picture on your LinkedIn profile.

**Prepare a thoughtful cover letter addressed to Kelly Greens Golf & Country Club search committee/Jordan**

**Kovalcik, GM/COO.** Clearly articulate your alignment with this role, why you want to be considered for this position at this stage of your career, and why KGG&CC and the Fort Myers area will benefit you, your family, your career, and the Club if selected.

**You must apply for this role as soon as possible but no later than June 18th, 2024. Candidate selections will occur in early July, with the first Interviews expected in July and the second interviews a short time later. The new candidate should assume their role in mid-late August.**

**IMPORTANT:** Save your resume and letter in the following manner:

“Last Name, First Name - Resume”

“Last Name, First Name - Cover Letter, Kelly Greens Golf & Country Club”

(These documents should be in Word or PDF format)

Note: Once you complete the application process for this search, you cannot go back in and add additional documents.

[Click here](#) to upload your resume and cover letter.

If you have any questions, please email Bethany Taylor at [bethany@kkandw.com](mailto:bethany@kkandw.com).

**Lead Search Executive:**

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Search Executive

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