



Position Description:

Title: Chief Financial Officer
Supervisor's Title: CEO
Supervisor's Name:
Department: Finance
FLSA Status: Exempt
Revision Date: July 2025

Job Summary *(In just a few sentences, describe the purpose of this position):*

- Lead CAI financial operations while safeguarding its financial and human resources. Work as key partner with program heads to accomplish annual and long-term goals of volunteer board. Establish credibility throughout the organization as an effective developer of solutions to business challenges.

Primary Duties *(Describe, in order of most critical first, the major job responsibilities for which the incumbent will be held accountable):*

- Financial and administrative leader of organization.
- Actively participate in the development of the organization's plans, programs and budgets as a strategic partner and business advisor.
- Direct the financial operations of CAI and related entities with the foremost duty being the protection of their assets by utilizing effective internal controls.
- Monthly and year-end reporting of financial results in a transparent manner with attestation to accuracy of year-end audited statements.
- Provide financial compliance to CEO as part of Executive Limitation reporting to Board of Trustees.
- Financial analysis, forecasting, benchmarking and development of financial metrics in support of tactical and strategic plans – the ultimate objective being sound decision making to improve the overall operation and effectiveness of the association.
- Management of CAI's investments in conjunction with investment advisor.
- Lead the annual budget process for CAI and affiliates.

- Negotiate and oversee all business insurance policies including D&O, workers compensation, general business, and fidelity bond as the principal risk management provider of the organization.
- Work with the executive team and CEO to determine price modeling for market rate for products and services.
- Oversee annual audit by independent accountants.

Inter-Departmental Relationships *(Briefly describe how this position must interact with other departments):*

- Function as a business advisor/partner to program areas to further CAI strategic financial goals. Ensure sufficient infrastructure - in terms of finance, administration, human resources and information technology - is in place to accommodate staff objectives.

External Relationships *(Briefly describe the types, purposes, and relationship with organizations and/or individuals outside the organization):*

- Principal liaison to independent auditors/audit committee; interact frequently with bankers, investment advisors, attorneys and other service providers.

Critical Products/Services and Deadlines *(Briefly describe standard, major work products or services and their associated deadlines or timetables):*

- Monthly financial reporting for three entities, preparation of annual budget, oversee annual audit and tax/regulatory compliance, review and solicit bids on an annual basis for corporate insurance, and employee benefits.

Fiscal Responsibility *(Briefly describe all budget, revenue, acquisition or other types of financial responsibility):*

- Develop and manage annual budget process.
- Develop and oversee the AP process.
- Responsible for the financial reporting of CAI, CAMICB and the Foundation.
- Responsible for the management of the investments for all three entities.
- Responsible for the acquisition of all assets of the organization.
- Oversee management of payroll and related expenses.
- Responsible for the management of fringe benefit plans.

Supervisory Responsibility *(List all positions supervised):*

- Director of Finance
- Accounting Team

Required Background:

- Education:
 - B/A required
 - CPA required
- Skills:
 - High ethical standards; effective leader with good communication, interpersonal and analytical skills.
 - Requires a forward thinker with sound judgment and ability to prioritize and balance multiple projects and demands simultaneously.
 - Ability to collaborate and thrive in a team environment with volunteer leaders and staff.
- Type Experience:
 - Previous financial and high-level managerial experience in association/not-for-profit organizations.
 - Demonstrated success in organizing and managing internal office operations.
- Years Experience:
 - 8-10 years