

## CHIEF FINANCIAL OFFICER PROFILE: QUAIL WEST FOUNDATION NAPLES, FL

### CHIEF FINANCIAL OFFICER AT QUAIL WEST FOUNDATION

An exceptional opportunity awaits an accomplished financial leader to join Quail West Foundation as its Chief Financial Officer (CFO). This role is perfect for a results-driven professional with a strong foundation in financial strategy and operations, who also brings a natural aptitude for hospitality and service excellence. Reporting to the Chief Operating Officer (COO) and working closely with the Board of Directors, the CFO will lead critical financial initiatives, drive operational efficiencies, and support the Club's long-term success. Candidates with diverse industry backgrounds are encouraged to apply, provided they possess "hospitality DNA" — an innate understanding of and passion for creating exceptional experiences. This position offers the opportunity to make a lasting impact within a highly regarded private club, combining strategic leadership with a focus on excellence in service and operations.

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

### ABOUT QUAIL WEST FOUNDATION AND COMMUNITY

Quail West, a prestigious private golf and country club in Naples, Florida, epitomizes luxury and sophistication. Renowned as a multiple-time "Community of the Year" and Platinum Club of America, this exclusive enclave features a 100,000-square-foot clubhouse, a modern fitness and wellness center, and two championship golf courses originally crafted by Arthur Hills and thoughtfully enhanced by Drew Rogers. The Lakes and Preserve Courses encapsulate all the best golf has to offer and then some. The community offers an array of magnificent estate homes, set against picturesque vistas of emerald fairways and shimmering lakes, combining natural beauty with architectural elegance.

The clubhouse blends casual comfort with refined elegance, providing diverse dining options, social spaces, and enhanced culinary facilities. Additional amenities include a state-of-the-art racquet sports complex, a Junior Olympic-sized indoor pool, a full-service salon and spa, and a variety of lifestyle enrichment offerings. Quail West's limited membership ensures an intimate and welcoming environment, delivering exceptional service and experiences for members and guests. Perfectly positioned near Southwest Florida's stunning beaches, world-class dining, shopping, and just minutes from the Gulf of Mexico and the airport, Quail West is the ultimate address for luxurious living and leisure.

**MISSION STATEMENT:** To be the preferred residential club community and workplace in Southwest Florida.

### QUAIL WEST FOUNDATION BY THE NUMBERS:

- Approximate Number of Members: 689
- \$29M Approximate Gross Volume
- \$200K Initiation Fee
- \$30,280 Dues + 5K in Capital Dues
- \$18.6M Approximate Annual Due Volume
- \$4.3M Approximate F&B Volume
- \$16.4 Gross Payroll
- 225 FTE Employees & 55 Seasonal
- Average Age of Members is 67
- 9 Board Member with 3 Year Terms
- 52,000 approximate rounds of golf
- Club Accounting & POS System: Jonas

- Clubs Tax Status: Not for Profit Corp (file 1120)

**QUAIL WEST FOUNDATION WEBSITE:** [www.quailwest.com](http://www.quailwest.com)

### **CHIEF FINANCIAL OFFICER - POSITION OVERVIEW**

The Chief Financial Officer (CFO) at Quail West Foundation is a key strategic leader, reporting to the Chief Operating Officer (COO) and collaborating closely with the Treasurer and Board of Directors. The CFO provides forward-thinking leadership, leveraging financial data and forecasting tools to assess the Club's financial health, deliver actionable insights, and ensure long-term fiscal sustainability. In partnership with the COO, the CFO aligns financial strategies with the Foundation's overarching goals and objectives.

As the leader of the finance and accounting team, the CFO oversees the Controller, who manages Accounts Receivable and Accounts Payable, and the Information Technology Manager. The CFO establishes a collaborative and supportive environment that ensures accurate financial reporting and effective administrative operations. Additionally, the CFO serves as a mentor and resource for department heads, equipping them with a clear understanding of their budgets, financial data, and the decision-making processes that impact their areas. By fostering education and collaboration, the CFO empowers department leaders to confidently manage their responsibilities. The finance and accounting team, under the CFO's leadership, exemplifies a culture of transparency, effective communication, and partnership across all levels of the organization.

### **FINANCIAL LEADERSHIP AND OPERATIONS**

- Oversee Quail West's financial operations, including accounts payable, accounts receivable, payroll, fixed assets, and all associated reporting.
- Prepare monthly financial reports for the Board of Directors, Finance Committee, and COO, including operating budgets, financial forecasts, and analyses.
- Develop, analyze, and interpret statistical and accounting information to evaluate operating results for costs, revenues, budgets, and trends. Proposes corrective actions to ensure budget and performance goals are met.
- Review monthly ledger reconciliations, including receivables, payables, bank accounts, asset accounts, and wage accounts.
- Supervise the preparation of audit papers and tax returns, ensuring accuracy and compliance.
- Prepare an annual financial operations report for presentation at the membership meeting.
- Together with the Treasurer, manage investments in US Treasuries and other approved instruments.
- Participate in the selection and negotiation of the Foundation's insurance policies, monitoring property and casualty coverage to protect assets.
- Participate in the selection and negotiation of employee benefits, including group health and 401(k) programs.

### **POLICY DEVELOPMENT AND COMPLIANCE**

- Develop and administer policies and procedures to control and coordinate accounting, auditing, budgets, taxes, and other financial systems.
- Ensure compliance with the Delegation of Authority Policy by reviewing cash disbursements, signing checks, and maintaining banking relationships.
- Oversee legal issues, including personnel matters, workers' compensation, and liability cases.

### **LEADERSHIP AND COLLABORATION**

- Evaluate the finance and administrative department structure and oversee hiring, scheduling, training, performance coaching, and professional development of team members.
- Provide education and support to department heads in formulating and managing capital and operating budgets, cash flow statements, and projections.
- Attend Board, Finance Committee, Endowment Fund, and other meetings as required, serving as a key financial resource.
- Conduct an annual review and serve as the steward of the Foundation's Capital Reserve Studies.

## STRATEGIC PLANNING AND TECHNOLOGY

- Oversee the execution and updating of the Foundation's Information Technology Plan.
- Assist with evaluating and optimizing computer systems and applications for accounting, membership, point-of-sale, fixed assets, and other departmental functions.

## STEWARDSHIP AND GOVERNANCE

- Act as a steward of the Foundation's assets, ensuring financial sustainability through sound investments and resource management.
- Maintain relationships with banks to manage the Foundation's accounts and loans, if applicable.
- Review and approve all major financial documents to ensure accuracy, compliance, and alignment with organizational objectives.

## CANDIDATE QUALIFICATIONS AND CHARACTERISTICS

- **Extensive Financial Leadership:** 10+ years of progressive financial leadership experience in organizations of comparable size and scope, ideally within real estate development, hospitality, or private club industries.
- **Strategic Visionary:** A bold and insightful thought partner to the COO and Board, capable of bringing strategic vision, innovative thinking, and a focus on driving member value and satisfaction.
- **Integrity and Business Acumen:** Demonstrates unwavering integrity, exceptional business acumen, and a deep understanding of the unique culture and operations of private clubs.
- **Leadership and Collaboration:** Proven track record of leading and collaborating with high-performing teams, fostering a member-centric focus, and producing meaningful financial insights for stakeholders.
- **Technical Proficiency:** Comprehensive understanding of GAAP principles, coupled with hands-on experience in information technology systems, including Microsoft Office, Point-of-Sale systems (JONAS software preferred), and payroll management systems (Paylocity preferred).
- **Effective Communication:** Excellent verbal, written, and interpersonal communication skills, with the ability to actively listen, convey complex information clearly, and navigate sensitive topics in a multicultural work environment.
- **Coaching and Development:** Skilled in developing and mentoring direct reports and support staff, creating a culture of accountability, and ensuring team growth and success.
- **Project Management Expertise:** Experience managing construction and renovation projects, with a strong emphasis on accurate financial reporting, forecasts, and sensitivity analyses.
- **Member Satisfaction:** Demonstrated success in overseeing financial operations that achieve high levels of member satisfaction through clear communication and member-centric decision-making.
- **Organizational and Adaptability Skills:** Strong organizational abilities, attention to detail, and the capability to adapt quickly to evolving needs and situations.
- **Proven Management Abilities:** Ability to set clear goals, delegate responsibilities effectively, and hold team members accountable.
- **Presentation and Executive Presence:** Possess executive presence, with the ability to confidently present complex information to diverse audiences, including Boards and committees.
- **Volunteer Leadership Engagement:** Experience working with volunteer Boards and committees is a plus.
- **Passion for Hospitality:** Genuine passion for hospitality and creating exceptional experiences for members and staff.

## EDUCATIONAL AND CERTIFICATION QUALIFICATIONS

- A Bachelor's degree in accounting or finance is required.
- An M.B.A., Master's degree, and/or Certified Public Accountant license is a plus.
- HFTP membership is encouraged; CHAE certification is a plus.

## EMPLOYMENT ELIGIBILITY VERIFICATION

In compliance with federal law, all persons hired will be required to verify identity and eligibility to work in the United States and to complete the required employment eligibility verification form upon hire.

## **SALARY AND BENEFITS**

Salary is open and commensurate with qualifications and experience. The club offers an excellent bonus and benefits package.

## **INSTRUCTIONS ON HOW TO APPLY**

Please upload your resume and cover letter, in that order, using the link below. Ensure your documents are fully prepared to attach when prompted during the online application process. Please ensure your image is not included in your resume or cover letter; it should be used only on your LinkedIn profile.

Prepare a thoughtful cover letter addressed to the **Quail West Foundation Chief Operating Officer/Alexis Chaffee**. Clearly articulate your alignment with this role, why you want to be considered for this position at this stage of your career, and why QWF and the Naples 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 February 24, 2025. Candidate selections will occur in late-February with the first interviews expected in early March and the second interviews a short time later. The new candidate should assume his/her role as soon as possible but no later than early/mid-May.**

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

“Last Name, First Name - Resume” &

“Last Name, First Name - Cover Letter – Quail West”

(These documents should be in Word or PDF format)

Note: Once you complete the application process for this search, you are not able to 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)

### **Search Executive:**

Michelle A. Riklan

Search Executive

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