

# KOPPLIN KUEBLER & WALLACE

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## **DIRECTOR OF FINANCE PROFILE: THE FOREST COUNTRY CLUB FORT MYERS, FL**

### **THE DIRECTOR OF FINANCE AT THE FOREST COUNTRY CLUB**

The new Director of Finance (DOF) will be a financial partner to the General Manager/Chief Operating Officer and support each department head in budgeting, workforce planning, cost controls, and strategic financial planning for the upcoming year. Your unique perspective as the DOF, focusing on financial responsibilities, will help department heads understand and meet the financial needs associated with their areas. Establishing trust and positive relationships with department heads is paramount, and you'll seamlessly integrate into a collaborative and dynamic management team. Open communication, approachability, and a supportive approach are highly valued, making this an ideal environment for a DOF who embodies these principles and will contribute to the ongoing success of The Forest Country Club. Your financial leadership will help continue to shape an energetic and vibrant future at The Forest Country Club.

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

### **ABOUT THE FOREST COUNTRY CLUB**

The Forest Country Club, located in South Fort Myers, is home to two award-winning walkable courses named best of Gulfshore Life for four consecutive years, with two distinctly different courses keeping golfers of any skill level challenged. The transitional-style Clubhouse serves as a stunning centerpiece. The Club features floor-to-ceiling windows affording sweeping panoramic views, inviting the great outdoors inside, complementing the luxurious decor, waterfall wall, and furnishing to complete an upscale yet comfortable ambiance to the lounge areas, dining rooms, fitness center, and patio space.

### **THE FOREST COUNTRY CLUB BY THE NUMBERS:**

- Members: 711
- Initiation Fee - \$55,000
- Gross Volume: Approximately \$11.6M
- Annual Dues: Approximately \$6.4M
- Gross Payroll: Approximately \$6.1M
- Annual Rounds of Golf: Approximately 50,000
- The Club is organized as a 501(c)(7)
- Employees: Approximately 100 FTE and 20 Seasonal Staff
- Number of Board Members: 9 with a 3-year term
- Average age of Membership: 71
- The Club uses ClubEssentials for POS and accounting systems

**THE FOREST COUNTRY CLUB WEBSITE:** [www.theforestcc.com](http://www.theforestcc.com)

### **DIRECTOR OF FINANCE JOB DESCRIPTION**

The DOF reports to the General Manager/Chief Operating Officer (GM/COO) with a dotted line to the Finance Chairman and will be the GM/COO's financial thought partner, working side-by-side with the GM/COO to meet the expectations and the mission set forth by the Board.

Their primary focus is on advancing and upholding the Club's Mission Statement, with a specific emphasis on continually elevating the members' and their guests' lifestyle experience to an extraordinary standard and collaborating closely with the leadership team.

The selected individual must be an exceptional communicator, ensuring that messages are received and understood, and ultimately a strong "thought partner" with the new GM/COO.

As an integral part of the leadership team, the DOF will assume clear ownership of day-to-day financial operations and manage the business, the finance team, and financial processes to maintain control and drive financial results. The successful candidate will support the management teams' GM/COO, Golf and Golf Maintenance, Racquets, Membership/Marketing, Wellness, and F&B leaders on financial data, analysis, and processes and be a solid team collaborator with each of these departmental leaders.

As DOF, this individual will ensure accurate financial processing such as budgets and financial statements, payroll, accounts payable, accounts receivable, and expense reports. They will guarantee the timely completion of yearly financial audits. The DOF will lead, mentor, coach, and grow, as needed, the finance and accounting team, and be expected to function similarly and cooperatively with all other departmental leaders and staff.

#### **KEY CHARACTERISTICS**

- **INTEGRITY:** A high level of unquestionable integrity is a must.
- **TRUSTWORTHY:** Ability to establish financial credibility with management and club governance.
- **APPROACHABLE:** Works with all stakeholders (members, management, employees, and the community) to provide information, educate, and deliver positive results with service excellence.
- **A NATURAL LEADER:** Desires to mentor and develop the team.
- **PASSIONATE:** A team member who wants to be part of a "WE" culture.
- **TEAM MANAGEMENT SKILLS:** Enjoys teaching, setting expectations, coaching as needed, instilling an "accountability mindset," and holding individuals accountable.
- **STRATEGIC THINKER:** Possesses a natural "THOUGHT PARTNER" style.
- **TECHNOLOGICALLY SAVVY:** Systems & automation driven; can lead service disruption mitigations.

#### **SELECT KEY RESPONSIBILITIES**

##### **STRATEGIC GUIDANCE**

- Direct the financial operations with the GM/COO of the Club. Formulate, receive, and recommend policies for approval relating to accounting, auditing, budget, revenue, and cost control procedures.
- Develop, implement & maintain structured and transparent planning/budgeting processes.
- Analyze cash flow, cost control, and expenses to pinpoint potential areas for improvement. Adjust reporting and analysis depth relative to the materiality of business decisions.
- Proactively approach data-driven analysis to assist/advise the GM/COO and Dept. Heads.
- Ensure the reporting needs of the Board and members are met on time.
- Work with the GM/COO to deliver a budget to the Board; explain variances and advocate line items.
- Anticipate unfavorable financial results or variances; conduct research and offer preliminary explanations and countermeasures. Communicate as appropriate with the Finance Committee.
- Maintain long-term capital project schedules, files, budgets, costing and payouts, and capital asset study.

##### **LEADERSHIP**

- Serve as an engaged leader with a solid financial vision who will drive financial controls and results, offering consistency, timeliness, and accuracy of finances and reporting.
- Participate and present to the Finance Committee, Executive Committee, and Board as required; listen to feedback; provide input. Communicate and defend data-driven recommendations that may differ from Governance and the Finance Committee. respectfully, confidently, and professionally.
- Support monthly reviews with management teams and provide weekly reporting and monthly forecasting of the financial and operational outlook vs. the targets.
- Strive to enhance the member experience in billing, charges, or financial interaction with the Club.

- Oversee investment decisions for the Club.
- Exhibit a positive attitude with members, management, and staff.

#### **TAX, BENEFITS, BUDGETS, REPORTING**

- Oversee employer 401K plan. Review investment decisions by investment advisors.
- Ensure monthly reporting is completed for the Finance Committee.
- Oversee the reconciliation of bank accounts and approve transfers as needed throughout the year.
- Prepare 1099's and W-2s for end-of-year in addition to other year-end reports. Submit all reports to the government by the end of the year. Complete and maintain year-end audits with the CPA firm.
- Make sure all federal, state, and payroll taxes are paid promptly. Pay sales taxes and occupancy taxes; Prepare journal entries for the month. Analyze general ledger, A/P, A/R, and fixed assets.
- Maintain awareness and knowledge of current tax law changes or tax-related legislation that directly impacts the Club. Use that knowledge to leverage the Club's financial reporting to incorporate any tax/reporting advantages.
- Lead the budget process by establishing policies, procedures, and expectations for budget preparation, approval, execution, and monitoring; collaborate with GM/COO and department heads to ensure understanding, ownership, and buy-in; ensure the budget is realistic, in alignment with the Club's mission, and accurately reflects the current operating environment; educate department heads on the budget process; and provide real-time or timely reports on financial issues impacting department budgets.
- Compare relevant data, such as YTD results versus budget or current year versus the previous year, to identify issues or trends as soon as possible.

#### **STAFF DEVELOPMENT**

- Assess, hire, mentor, train, develop, and retain accounting staff. Hold staff accountable for performing at a high service level. Conduct annual performance reviews with developmental plans.
- Motivate team; build a solid financial culture driven to excellence with a sense of urgency.

#### **TECHNOLOGY**

- Oversee the Information technology department, outsourced through a third-party vendor.
- Ensure equipment is maintained and forecast replacements and replacement costs.
- Stay current on new technology. Excited about finding ways to improve efficiency and productivity through automation and new technology; ability to recommend and implement.

#### **LEGAL AFFAIRS AND CONTRACT MANAGEMENT**

- Create/sustain productive banking, insurance, and contractual relationships. Liaise with 3rd parties.
- Lead and manage technology investments, policies, and contract vendors.

#### **CANDIDATE QUALIFICATIONS**

- Has "Hospitality DNA"; team-oriented and able to meet deadlines. Ideally, someone from the greater Collier/Lee County area who has both local and hospitality experience.
- Has an "executive presence" and excellent presentation skills.
- Experience managing 501(c)(7) not-for-profits business reporting and finance procedures is a plus.
- Experience with construction and renovation projects and reporting on both is desired.
- Experience with administration of 401k and benefit contribution plans.
- Strong problem-solving and creative thinking skills; exercise sound judgment based on analysis.
- Ability to extract relevant inputs from key individuals across varied functions and experience levels to ensure well-informed forecast and analysis and anticipate key sensitivities.
- Excellent financial reporting and accounting skills, including financial disclosures and forecasting.
- Positive attitude and contribution to an inclusive and engaging work environment.
- Stewardship to ensure financial stability; operate a well-managed and fiscally responsible process.
- Participation in appropriate industry educational seminars and workshops/conferences to increase knowledge of trends, best practices, and IT applications for Club and financial operations, as well as to enhance skills overall and establish networking contacts.

## **EDUCATIONAL AND CERTIFICATION QUALIFICATIONS**

- Bachelor's Degree from a 4-year college or university with a concentration in Finance or Accounting.
- 10+ years of professional finance/accounting experience with a minimum of 3+ years at a Controller/Staff Accountant level and current accounting certifications.

## **SALARY AND BENEFITS**

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

## **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 be attached when prompted for them during the online application process. Please be sure your image is not present on your resume or cover letter; that should be used on your LinkedIn Profile.

Prepare a thoughtful cover letter addressed to Mr. Kyle Ruch, GM/COO, and clearly articulate your alignment with this role why you want to be considered for this position at this stage of your career, and why The Forest Country Club and the Ft. Myers, FL area will be beneficial to you, your family, your career, and the Club if selected.

You must apply for this role as soon as possible but no later than Monday, June 17, 2024. Candidate selections will occur a short time later with interviews expected sometime in July. The new candidate should be ready to assume his/her role in late Summer 2024.

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

"Last Name, First Name - Resume" &

"Last Name, First Name - Cover Letter – Forest CC"

(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 Patty Sprankle: [patty@kkandw.com](mailto:patty@kkandw.com)

## **Lead Search Executive:**

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