

## **POSITION: Financial Services Associate**

### **POSITION SUMMARY**

Financial Services is a sub-department of the Office of the Chairman within Combined Properties, Incorporated (“CPI” or “Company”), which manages all of the Chairman’s and Andrew Nagel’s (“AJN”) (together “The Principals”) personal financial affairs and assets. Reporting to the Senior Vice President, Financial Services (“SVP”), the Financial Services Associate (“Associate”) provides high-level administrative, bookkeeping, household human resources, project management, and expense management support to the Financial Services department. The Associate serves as a liaison between the members of the Financial Services department and employees of CPI, the Chairman’s household staff, employees of the Chairman’s other businesses, and external personal and business contacts. This position is responsible for processing the bi-weekly payroll for household staff, onboarding and offboarding household staff, managing household staff benefit programs, managing, tracking and paying household and The Principals’ expenses, managing the corporate and personal credit cards of the Chairman, household staff and AJN, overseeing and tracking petty cash for household staff, developing and enforcing specific household and department operating policies and procedures, and supporting the SVP, as needed, among other duties and responsibilities. The Associate is expected to work at least three days per week in the office, preferably coinciding with the days the SVP is in the office and may be required to work additional hours to answer questions or handle urgent matters, on occasion. Core work hours for the Associate are 9:00 am – 5:30 pm, Monday through Friday, unless the business schedule of the SVP necessitates change, or the SVP otherwise agrees to changes to the schedule. This position serves as a back up to the Executive Assistant to the President/Chief Operating Officer (“EA”) when she is out of the office on PTO.

The Associate has access to and interacts, on a highly discretionary level, with The Principals’ closest business and personal contacts. The Associate also interacts with a variety of external personnel including vendors, contractors, and other service providers, to schedule and coordinate services as requested by the SVP or The Principals. The Associate will have access to highly confidential information and accounts and will be expected to maintain such information in the strictest confidence. Consequently, the Associate may be subject to a background check.

This position works collaboratively with the following personnel:

1. the SVP;
2. The Principals;
3. Household Staff at The Principals’ residences;
4. the EA;
5. the Personal Assistant to The Principals (“PA”);
6. Staff within the Financial Services department (aka The Family Office) most closely with the Financial Services Accountant (“Accountant”); and
7. Staff within CPI, Combined Creative, and any other of the Chairman’s business enterprises.

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demonstrate initiative to anticipate the needs of the SVP and others whom this position supports to provide seamless and effective support in multiple areas.

8. Must (i) be proficient with various technology platforms including MS Office Suite (Word, Excel, Outlook, PowerPoint, etc.), (ii) have experience with videoconferencing systems, Zoom and Teams, and (iii) have familiarity with payment applications (e.g., Venmo, Apple Pay, Zelle, PayPal, etc.). Familiarity with any of QuickBooks, Quicken, Paychex, MineralTree, Zoho, or online banking systems a definite plus.