

## SENIOR VICE PRESIDENT, FINANCIAL SERVICES

### 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 personal financial affairs and assets. Reporting to the Chief Executive Officer (“CEO”), Combined Creative, the Senior Vice President, Financial Services (“SVP”) oversees the management of the Financial Services department, including departmental personnel and certain other of the Chairman’s personal and household staff. The SVP devises strategy, solutions and plans for the effective and efficient operations of the Financial Services department and the Chairman’s households while mitigating risks to the Chairman. This position is responsible for (i) effective management of departmental and senior household staff, (ii) developing, maintaining and enforcing appropriate departmental and household operational controls, processes and procedures, (iii) producing meaningful, reliable and timely reporting for the Chairman, (iv) preparing accurate and reliable budgets and cash flow projections, (v) monitoring and reporting on budget to actual performance, (vi) cash and investment management, (vii) credit card usage monitoring, including fraud detection and resolving issues, and reporting, (viii) payroll processing and household H/R and benefits administration, (ix) insurance and risk management, (x) charitable contribution and Foundation management, (xi) departmental and household expense approvals and payment processing, (xii) estate planning management, including overseeing the annual review of the Chairman’s Estate Plan, and (xiii) effective management of the Chairman’s personal capital transactions, among other duties required to effectively manage the Financial Services department and the operations of the households. This position works closely with (i) finance and accounting personnel within the Company related to the annual audit and tax processes, business cash management, and other business and tax related matters impacting the Chairman, and (ii) Andrew J. Nagel (“AJN”), the Chairman’s personal partner, related to household matters and AJN’s personal and financial affairs.

### QUALIFICATIONS

- Education:** A College degree required with a concentration in Finance or Accounting; an MBA preferred.
- Experience:** Minimum ten (10) years’ experience in Family Office or closely held small business operations, to include at least five (5) years’ experience in a senior financial manager position. Strong experience required managing people and processes, preparing budgets, financial projections and reporting, developing and implementing effective operating strategies, processes, and financial/accounting controls, and in risk management, including insurance and investments. This position is finance and operations intensive yet requires broad knowledge of all facets of family office or closely held small business operations, including related software application packages and online systems.
- Skills:** Must have strong financial management experience, with demonstrated skill in developing and implementing operational procedures and controls, and financial reporting, budgeting, and planning packages by prescribed deadlines, as well as superior communication, people management, and critical thinking skills. Strong experience with family office or closely held small business operations needed.

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Must be an adaptive learner with a focus on the detail and able to effectively balance multiple priorities with competing deadlines simultaneously. Must be comfortable in deadline intensive environment while meeting the high expectations of the Chairman. Ability to collaborate well with people inside and outside the organization at all levels is required. Strong computer literacy also required including proficiency in MS Office Suite (Word, Excel, Outlook) with knowledge of one or more of BNA, Mineral Tree, Paychex, Zoho and/or Quicken/QuickBooks a definite plus. The person in this position will work with highly sensitive and confidential information relating to the Chairman's personal and financial affairs and must accordingly exhibit the highest level of integrity in all his/her business dealings.