

## POSITION: FINANCIAL SERVICES ACCOUNTANT

### 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 Financial Services Manager (“Manager”), the Financial Services Accountant (“Accountant”) provides detailed, accurate and timely accounting and analytical support to the Financial Services department. This position is responsible for maintaining accurate and reliable financial books and records for the Financial Services department including, but not limited to, assisting with the cash management function and the preparation of financial reporting, budget and cashflow projections, and tax workpapers, returns, extensions, payments and projections. The Accountant is expected to work at least three days per week in the office, preferably coinciding with the days the Manager is in the office and may be required to work overtime on occasion. Core work hours for the Accountant are 9:00 am – 5:30 pm, Monday through Friday, unless the business schedule of the Manager necessitates change, or the Manager otherwise agrees to changes to the schedule.

The Accountant will have access to and work with highly confidential information and accounts and will be expected to maintain such information in the strictest confidence. Consequently, the Accountant may be subject to a background check.

This position works collaboratively with the following personnel:

1. The Manager;
2. Personnel within the Financial Services department (aka The Family Office) and household staff;
3. Staff within CPI, namely those within the Accounting department; and
4. Outside third-party tax and other consultants/service providers.

### QUALIFICATIONS

**Education:** A Bachelor’s degree in Accounting required. A CPA preferred.

**Experience:** Three to five years of experience as an accountant serving in a progressively responsible role with demonstrated experience working with numbers, tax and GAAP accounting principles, expense management, budgeting, financial reporting, and financial software applications, namely Quicken and QuickBooks.

**Skills:**

1. Must be (i) mature in character, with excellent interpersonal skills required to work with different levels within the Company, and (ii) comfortable working independently and in a busy and deadline sensitive work environment.
2. Must have solid knowledge of accounting principles and controls and strong analytical skills.

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3. Must have excellent (i) attention to detail and (ii) accounting, budgeting, and financial reporting skills.
4. Must be able to handle highly confidential information and matters with the utmost discretion.
5. Must be highly organized, with the ability to effectively manage multiple priorities and fixed and sometimes competing deadlines.
6. Must demonstrate an inquisitive nature and the ability to research unique accounting questions or issues utilizing a clear understanding of accounting principles.
7. Must produce error-free work that can be relied upon with attention to detail and demonstrate initiative to meet the expectations set by the Manager.
8. Must (i) be proficient and very comfortable working with various technology platforms including MS Office Suite (Word, Excel, Outlook, OneDrive), and (ii) Quicken and QuickBooks or other similar accounting applications. Experience with any of the following is a definite plus: PayChex, MineralTree, Zoho, ProSeries, BNA Income Tax or online banking systems.