

## Director of Finance

*Shared Services position across all Salesmanship Club entities*

**Reports to:** Chief Operating Officer/Executive Director of Salesmanship Club of Dallas with dotted lines to Executive Directors of Momentous Institute and Salesmanship Club Charitable Golf of Dallas

**Position Status:** Full-Time, Salary-Exempt

[Momentous Institute](#) and the [Salesmanship Club of Dallas](#) have been dedicated to strengthening the mental health of children, families, and communities for over a century. Each year, our organization supports individuals through innovative mental health services, our nationally recognized [Momentous School](#), and professional training for educators, doctoral students, and professionals who work with children. Our evidence-based insights extend the impact of our work well beyond those we directly serve, fostering a world of emotionally thriving people reaching their full potential.

Shared Services plays a vital role in supporting the daily operations and collective strategic goals of Momentous Institute, [THE CJ CUP Byron Nelson](#), and Salesmanship Club of Dallas. These departments include Finance/Accounting, Human Resources, Marketing & Communications, Legal, IT, Building Operations, Community Engagement, and Volunteer Services. By managing these shared functions, Shared Services ensures that all lines of business across the collective organization have the resources, services, relationships and infrastructure needed to operate effectively and to achieve its annual goals. Through expert support and streamlined processes, the Shared Services teams strengthen the foundation that allows our programs and services to thrive.

**Role:** This position supports the Chief Operating Officer and the Executive team by providing key financial information, budgeting, and operational analytics, while driving a culture of accountability. The Director of Finance must have an experienced background in producing financial statements for multiple non-profit business units, navigate the complexities of affiliate structures and relationships, identify fiscal and operational best practices and implement accordingly. This position must have the ability to set long-term vision and to develop plans for financial sustainability and a high social-emotional intelligence to partner effectively with budget owners, affiliate leaders and diverse stakeholders to financially strengthen the integrated work of:

- Salesmanship Club of Dallas, a fellowship of 670+ business and professional leaders united to strengthen youth and families through service, leadership and philanthropy.
- Momentous Institute, a Salesmanship Club of Dallas-sponsored nonprofit who is a nationally recognized leader providing innovative mental health services, education and professional training to strengthen the lives of children, families and communities.
- THE CJ CUP Byron Nelson, a Salesmanship Club of Dallas-operated, premier PGA TOUR golf event that fuels our mission by generating critical funding, mission amplification and community engagement for youth mental health.

The Director of Finance will supervise a staff of accounting professionals who provide financial support to various volunteer committees including but not limited to the Audit Committee, the Finance Committee, the Investment Committee, the Development Committee, and multiple event planning

committees. In addition, the position is the interface with and oversees the services provided by independent contractors and vendors for the audit, human resources, insurance, legal services, and tax.

This position develops and implements effective internal controls to ensure that the organization follows GAAP compliance and applicable federal, state, and local regulatory laws and rules for financial and tax reporting with a heavy emphasis on nonprofit compliance. While maintaining continuous sound financial practices, the Director of Finance establishes organizational objectives, policies, and procedures, and makes strategic recommendations that enhance financial performance.

**Essential duties and responsibilities:**

- Oversee all financial reporting activities including timely and complete financial reports, reports to funders, developing and monitoring of organizational budgets, forecasting and analysis.
- Work with multiple Executive Directors and Boards in leading the development and implementation of financial policies, procedures, and systems to achieve the organization's financial goals and objectives.
- Manage organizational cash flow, investments, banking relationships, and financial risks.
- Track important KPIs and analyze trends by leading accounting operations and financial systems management.
- Develop and maintain systems to ensure compliance with local, state, and federal government reporting requirements and tax filings and ensure filings with taxing authorities are made in a timely manner.
- Develop and maintain systems to ensure compliance with all contractual, government regulations, donor and 501(c)(3) requirements
- Oversee organizations' business insurance plans and legal review processes.
- Lead financial audits by coordinating the provision of information to external auditors for the annual audit; ensuring compliance with accounting standards, all audit issues are resolved, the preparation of the annual financial statements is in accordance with GAAP, and all 403(b) compliance issues are met.
- Manage all processes of file maintenance and records retention in accordance with policies and procedures and ensure compliance with applicable internal policies.

**Educational and Experience Requirements:**

- Minimum: Bachelor's degree in Accounting and 10+ years of professional accounting experience, preferably a combination of public accounting and industry accounting. Certified Public Accountant designation required.
- Demonstrated, successful background and experience in fund accounting and grant and investment management – providing for reporting of budgets, analyzing financial data, directing day to day accounting decisions and making recommendations to executive leadership regarding necessary accounting practices and procedures.
- Excellent interpersonal skills to develop collaborative, trusting relationships with staff and Salesmanship Club members.
- Prior supervisory experience and effective team leader in planning, coordination and follow through with the ability to motivate teams to produce quality results within tight timeframes and simultaneously manage several projects is required.
- Ability to exercise discretion and independent judgement on significant business and financial matters in an ethical and trustworthy manner.
- Desired personal qualities: initiative, integrity, and flexibility.

**Physical Requirements:**

- Requires reaching, carrying, pushing, pulling, and fine motor manipulation of files weighing up to 15 pounds.
- Constantly remaining in a stationary position, often standing, or sitting for prolonged periods.
- Requires fine motor manipulation and ability to read and distinguish files and documents.
- Some local travel to various worksites is required.

**The ideal candidate will exhibit Shared Services' core values:**

Collaboration, Service, Commitment, Respectfulness and Excellence

**Interested:**

Applications are currently being accepted, and the position will remain open until filled. Candidates from diverse backgrounds are encouraged to apply. Please send a letter of interest and resume to:

**Teri Isaacs, CPA**

Chief Operating Officer/Executive Director

[TIsaacs@Salesmanshipclub.org](mailto:TIsaacs@Salesmanshipclub.org)

*Momentous Institute/Salesmanship Club of Dallas is committed to creating a diverse and inclusive company culture and maintains a policy of non-discrimination for all employees and applicants in every facet of the organization's operations. Momentous Institute hires, trains, and promotes all qualified employees without discrimination based on race, color, sex, religion, national origin, age, military status, disability, genetic information, gender identity, or sexual orientation.*

*All employment offers are contingent upon successful completion of a criminal background investigation, including a check of the National Sex Offender Registry.*

**Policy Statement**

**No form of abuse will be tolerated, and confirmed abuse will result in immediate termination. Momentous Institute/ Salesmanship Club of Dallas will fully cooperate with authorities if allegations of abuse are made requiring investigation.**