

EMERALD HEIGHTS

Job Description

Job Title: Director, Financial Planning & Analysis
Department: Finance
Reports to: Chief Financial Officer

Job Overview:

Emerald Communities is a business of “People Helping People”. If you want to look back at the end of the day and see impact, you work in a business like this. You will have the ability to greatly influence the care provided to our residents and the opportunity to create long-lasting relationships that will impact many lives’ around you.

Emerald Communities, is a premier, faith-based, not-for-profit life plan community located in Redmond Washington. We are dedicated to providing our residents the best senior living experience in the Puget Sound area and offer a full continuum of care from independent living to assisted living, skilled nursing and secure memory care.

The Director, Financial Planning and Analysis provides financial planning and analysis in support of the CFO, Finance Department, company management and external partners. The Director supervises the activities of a Senior Financial Analyst.

DUTIES AND RESPONSIBILITIES

- Develop financial models to support analysis of a variety of financial and operating activities
- Lead in developing and maintaining long range financial plans
- Responsible for the annual budgeting process from beginning to the end
- Develop financial forecasts for operations and investments
- Analyze opportunities for business expansion and new business opportunities
- Provide analysis of financing alternatives to develop appropriate short term and long term capital structure
- Analyze capital investments and direct financial approval process
- Monitor spending for ongoing and major capital projects
- Partner with department heads to understand and explain variances and trends
- Analyze departmental operations and understand profitability aspects of their activities
- Develop financial and operational reports for company management and board of directors
- Prepare financial presentations for board and committee meetings and resident meetings
- Analyze actuarial models for pricing decisions (entrance fees and monthly service fees)
- Benchmark company’s financial and operating results against industry performance
- Monitor performance of the company’s stock and bond investment portfolio
- Monitor and forecast cash flow and loan covenants
- Oversee the posting of all required disclosure documents to EMMA, a service of the MSRB
- Analyze new resident financial applications and recommend for approval as appropriate
- Work with residents in need of financial assistance and recommend to senior management the amount of assistance to be granted
- Provide financial information to external business partners (actuary, banks, insurance broker, investment banker, consultants, development partners, auditors, investment advisors, etc.)

REQUIREMENTS

- Minimum of bachelor's degree in accounting, finance or business
- CPA or MBA desired
- 8+ years experience in financial analysis/financial management
- Experience with senior living industry a plus
- Good knowledge of accounting and financial concepts and practices
- Familiarity and aptitude in working with financial and accounting software
- Excellent skills and experience with spreadsheet software (Excel) and other Office software, and with building comprehensive financial models
- Excellent communication skills – speaking and writing
- Strong interpersonal skills in relating with co-workers and company management at all levels
- Effective in a hands-on, team-oriented environment
- Customer service orientation
- Produce accurate work in a timely manner
- Able to prioritize and efficiently handle multiple tasks within deadlines
- Deal positively with change
- Good judgment, common sense, high integrity
- Handle sensitive information in a highly confidential manner

Physical Demands

- Sit at desk/computer station for prolonged periods.
- Walk to various areas in the facility.
- Speak clearly in face-to-face interactions and over the phone.

Working Conditions

- Exposure Level to Bloodborne Pathogens: Level III
- Primary work area is well-lighted, temperature-controlled office.