

**Job Title**

Chief Financial Officer

**Short Description**

Demonstrates a positive outlook and consistently performs within the context of Go Energy Credit Union's philosophy, mission and corporate culture. Provides quality service and strives to consistently exceed service expectations. Embodies the attributes of the Go Energy Credit Union standards, accountability, respect and teamwork on a daily basis. Acts in a professional, friendly manner at all times. Completes work in a timely and accurate manner. Directs and manages all practices and activities in the Finance and Accounting functions to ensure compliance with State and Federal Rules and regulations. Manages auditing, accounting, and recordkeeping of the credit union to ensure they meet generally accepted accounting practices (GAAP). Make recommendations relating to budget preparations, income forecasts, and operational changes as needed.

**Full Description**

- Serves as a member of the Executive Team and supports the strategic priorities of the Credit Union.
- Direct the preparation of financial statements and other internal reports used to monitor and analyze key leading and lagging indicators driving the operational and financial performance of the Credit Union.
- Creates long term financial forecast models to assist with the development of strategic initiatives.
- Directs the functions of and monitors performance for the Accounting and Back Office departments.
- Participates in developing and evaluating the Credit Union's short- and long-term strategic goals and objectives. Responsible for strategic and annual business planning, oversight of financial operations, compliance with GAAP and credit union standards.
- Creates the overall operational budget for the Credit Union.
- Creates, prepares, and submits longer term capital and business development plans.
- Coordinates month end closing.
- Attends Board meetings to communicate the financial status of the Credit Union.
- Coordinates the data for the Asset Liability Management analysis and works with the Chair of the ALM Committee.
- Coordinates the reports for the Audit Committee meetings analysis works with the Chair of the ALM Committee.
- Develops investment strategies for Credit Union assets, monitors interest rate risks, and maintains the Credit Union's investment portfolio.
- Monitors liquidity through cash monitoring and liquidity forecasting.
- Oversees reporting to regulatory authorities, government agencies and other agencies as needed (NCUA 5300, 990, Report of Officials, and other types).
- Works directly with auditors and examiners on year-end

and other audits.

- Responsible for policy updates and revisions and makes recommendations to other Officers and Board of Directors.
- Responsible for the chart of accounts and necessary internal controls over the general ledger to include appropriate reconciling processes, software application and segregation of duties.
- Coordinates escheatment of accounts and checks pursuant to Georgia unclaimed property laws.
- Use effective interpersonal skills to build trust and foster a culture of accountability, transparency, and collaboration for the sole benefit of the Credit Union.
- Lead by example to ensure that key decisions are vetted by using objective, qualitative and quantitative information.
- Understand and assess potential risks facing the Credit Union and proactively work to mitigate those risks.
- Ensure the Credit Union complies with all legal and regulatory requirements.
- Takes on any additional assignments as directed.

- A minimum of five years' experience in a senior level position with a financial institution is required,
- Excellent analytical skills, people skills and self-direction. Proficiency with PC accounting, spreadsheet, financial data processing systems and word processing software.
- Strong understanding of and extensive professional experience with Accounting/GAAP principles, familiarity with non-profit and fund accounting.
- Excellent organizational, communication (both verbal and written) analytical, and negotiating skills.
- Demonstrated appreciation of the mission and ability to communicate with credit union members, regulators and investors, and our Board of Directors.
- Possesses high energy, positive "can do" attitude, curiosity, flexibility, teamwork, and attention to detail, high degree of initiative, proven ability to manage multiple tasks in a deadline driven environment, with a good sense of humor.

- To meet or exceed financial performance guidelines as set by the Board of Directors and Senior Staff.

- To maintain quality communication of policy & procedure in a timely manner.

- To provide friendly, professional and accurate service and support to all members and staff.

- Credit Union Knowledge: Develop an understanding of credit union history, philosophy, organization, bylaws, regulatory and operational procedures.

- Operational: Comply with all regulatory requirements of financial institution including but not limited to Bank

Secrecy Act / Anti-Money Laundering / USA Patriot Act / OFAC / Fair Lending Regulations / FACTA. General knowledge and understanding of deposit operations, lending activities, and other related consumer banking and compliance functions.

- **Work Environment:** Create an environment conducive to learning and accelerate innovation. Follow the core values of honesty, integrity, mutual respect, pride and ownership.
- **Technology:** Intermediate level knowledge of Excel, Word, and Outlook. Ability to learn and become proficient on credit union specific technology platforms. Basic understanding of various social media channels.
- **Other Skills:** Ability to communicate verbally and in writing in a professional manner when dealing with employees, members, vendors and company contacts.

**Physical Requirements:**

- Ability to lift and move a minimum of 40 lbs.
- Ability to use keyboard, monitor, telephone, and other standard office equipment.
- Ability to speak and hear on telephone.
- Ability to communicate effectively with others in person and via telephone, email, and written documents
- Ability to decipher data contained in documents, reports, spreadsheets, etc., presented both on paper and electronically. Ability to read fine print.
- Ability to transport self within credit union's geographic service area, with a valid GA state driver's license.

<b>Education</b>	Bachelor's degree required, Master's degree or CPA license preferred.
<b>Additional Comments</b>	Monday-Friday, Hybrid, able to work out of our Tucker, Hiram or Dallas Ga. location, Competitive Salary and Benefit
<b>Credit Union</b>	Go Energy Credit Union
<b>State</b>	Georgia
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<b>Expiration Date</b>	07/15/2024