

**Vice President & Chief Financial Officer
Washington, D.C.**

Our client has a strong positive culture with a challenging but supportive board and a motivated staff. True teamwork, along with strong growth objectives, is evident throughout the credit union, as well as the desire to do well and provide quality service to its members.

The Vice President & Chief Financial Officer will lead the Finance and Accounting functions of the credit union in accordance with generally accepted accounting principles. This person will be responsible for the administration, review and reconciliation of the credit union investment portfolio, asset/liability risk management system and other credit union financial activities. This key role will assure that credit union policies and procedures and state and federal rules and regulations are maintained in all areas of responsibility. In addition, this person will provide supervision and guidance to all Finance and Accounting personnel.

As a member of the senior management team, this individual will participate fully in the strategic planning process and will act as a strategic business advisor to management providing the financial information and analytical tools needed to make informed business decisions. Identification and exploration of new business opportunities is key to the success of this position. Communication skills, both written and verbal, are necessary as well as leadership presence both internal and external to the credit union. This person will serve as a key member of the credit union's Asset Liability Management Committee, Investment Committee and will regularly attend board meetings.

ESSENTIAL FUNCTIONS

1. Keep apprised of all changes within the financial services industry as they pertain to compliance and regulatory issues.
2. Develop revenue, expense and capital expenditure plans and related productivity goals.
3. Keep apprised of compliance and regulatory issues in all areas of responsibility.
4. Participate in strategic planning process directly and indirectly.
5. Monitor performance and identify profit improvement opportunities.
6. Serve as a member of the Credit Union's Asset/Liability Management Committee.
7. Manage interest rate risk under approved ALM Risk Guidelines.

8. Schedule, evaluate, train, supervise and direct accounting personnel.
9. Develop long range trend analysis of operating revenues and expenses including projected interest from loans and investments, funds available for investments and quarterly dividends.
10. Establish, implement and maintain a computerized accounting system in accordance with law, regulations and reporting requirements.
11. Prepare annual budget and related comparative reports including spread and variance analysis.
12. Overview of monthly financial packages.
13. Administer the credit union's investment portfolio and serve as a member of the Credit Union's Investment Committee.
14. Maintain and oversee the Credit Union's cash management function.
15. Assure accuracy of all credit union IRS and government reporting including corrections and amendments and inquiry responses as needed.
16. Prepare quarter-end and year-end statements and assure correct disbursements of funds to appropriate accounts.
17. Interface with appropriate outside agencies, as directed by CEO, to exchange necessary information needed for the successful operation of the credit union. Perform problem-resolution with outside agencies as needed.
18. Assist external auditors and federal examiners as needed.
19. Overview of employee payroll and the various jurisdiction reporting requirements.
20. Provide operational and member services support in all areas when needed. Perform other credit union functions and responsibilities as required or assigned.
21. Performs other duties as assigned. Attend meetings, conferences, seminars and training courses.

JOB SPECIFICATIONS

1. A minimum of five years senior financial management experience within a financial services organization (credit union, bank, etc) of similar size and complexity.
2. Extensive knowledge of accounting principles and practices, investment portfolio analytics/management and best in class asset/liability management skills.
3. The ability to read, analyze and interpret complex documents. To respond effectively to the most sensitive inquiries and/or complaints. Must possess the ability to make effective and persuasive presentations on controversial and complex topics to the Board of Directors and other outside groups.
4. Professional, well-developed interpersonal skills necessary for communicating with members, co-workers, vendors, regulators and Board of Directors.
5. Thorough knowledge of the Credit Union's policies, procedures, programs, products and services as they relate to the accounting, finance, investments and related functions.
6. Comprehensive understanding of management practices and techniques.
7. An energetic, forward-thinking and creative individual with high ethical standards and a professional image.
8. An undergraduate degree in accounting or finance; CPA and/or MBA preferred.

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