



# CREATIVE PLANNING

Title: Outsourced Accounting – Controller, School Services

Location: Any Location/Hybrid/Remote

## **JOB SUMMARY**

Creative Planning is a top tier wealth management firm that provides investment management services and full comprehensive financial planning inhouse. Creative addresses all aspects of financial planning from estate planning, tax strategy and risk management to retirement, education and charitable planning – using all in-house specialists.

**We do not accept resume submissions from third-party recruiters or staffing agencies. Please contact our recruiting team directly.**

As an Outsourced Accounting Controller and trusted advisor, you will work directly with clients to help manage their accounting and finance department, prepare financial reporting, and perform financial analysis. This position requires monitoring of details to effectively manage financial information and solve accounting issues for our clients.

## **JOB DUTIES**

- Prepare monthly financial reports
- Prepare monthly bank reconciliations
- Review and monitor cash flow projections.
- Review all funding sources for accuracy
- Advise clients on financial decisions
- Review and analyze year-to-date financial data and amend budget as necessary
- Present at virtual finance committee and school board meetings
- Annual audit preparation
- Manage and assist charter schools with their lease aid application
- Monitor restricted fund balances
- Monitor and implement GASB standards
- Review and submit sales & use tax filings
- Ability to adapt to client needs by providing immediate short-term solutions while working toward implementation of long-term goals
- Set and meet defined deadlines on projects with clients

## **REQUIRED EXPERIENCE / QUALIFICATIONS**

- BA/BS preferably in Accounting or related field of study
- 5+ years accounting experience
- K-12 school experience preferred

- Works well in a team environment
- References and documents work
- Ability to work with multiple clients
- Timely responses to internal and client communications
- Self-motivated, meets weekly/engagement hours expectations

#### **TECHNICAL SKILLS**

- MS Office/Windows experience particularly financial modelling and data management in Excel
- Strong analytical and problem-solving abilities
- An understanding of financial statements
- An understanding of accounting
- Excellent written and verbal communication skills
- Ability to communicate effectively with clients via email and phone
- Skyward, SMART Finance, Engagement proficiency preferred