

CANDIDATE PROFILE

Chief Financial Officer
Bent Tree Country Club
Dallas, TX

www.benttreecc.org



[Watch a short video here.](#)

Organization

Bent Tree Country Club, nestled in the heart of Dallas, Texas, boasts a rich history and a legacy of excellence. Established in 1972, the Club has become a cornerstone of the Dallas community, offering members a serene escape with top-notch facilities and services. The Club's 18-hole championship golf course, designed by Desmond Muirhead, is renowned for its challenging layout and picturesque scenery, attracting golf enthusiasts of all skill levels. Over the years, Bent Tree Country Club has continually evolved, embracing modern amenities while maintaining its timeless charm, ensuring a luxurious and enjoyable experience for its members.

In addition to its exceptional golf course, Bent Tree Country Club offers a wide range of amenities that cater to various interests. Members can enjoy tennis and pickleball on well-maintained courts, swim in the resort-style pool, or stay fit in the state-of-the-art fitness center. The clubhouse serves as the social hub, featuring elegant dining options, event spaces and a calendar filled with activities and events for all ages. Bent Tree is dedicated to fostering a welcoming and inclusive community, making it a perfect place for families and individuals alike to build lasting memories. The Club's commitment to excellence and attention to detail make it a premier destination for those seeking a vibrant and enriching country club experience.

By the Numbers:

- Total Club Revenue: \$24M
- F&B Revenue: \$5.3M
- Current Initiation Fee: \$125,000
- Monthly Dues: \$1,335
- Operating System: Club Essentials
- Full Time Employees: 175-200
- Dining Outlets: 4 Restaurants, 3 Snack Bars, 3 Banquet Spaces

Position Overview

The Chief Financial Officer (CFO) is the foundation of Bent Tree Country Club's policies and financial health. This vital position is relied upon by the General Manager/Chief Operating Officer, the management team and the Board of Directors to ensure the Club has the proper controls, administrative and reporting procedures, and people systems to effectively grow the organization while maintaining financial strength and operational efficiency.

Accurate record-keeping is fundamental to the CFO's role, but timely and thoughtful analysis of financial results is crucial for impacting both short- and long-term strategic decision-making. The successful CFO will be an energetic, forward-thinking and creative individual with high ethical standards and a professional image. Discretion and professionalism are paramount, along with a thorough understanding of finance, accounting, budgeting and cost control principles, including generally accepted accounting principles.

Guided by the GM/COO and within the limits of Bent Tree Country Club's policies and procedures, the CFO will develop the strategic direction of the Finance Department and manage all financial aspects of the Club to maximize business potential and growth. Responsibilities include optimizing traditional financial planning and analysis, auditing, compliance, treasury, financial reporting and controller functions. The CFO will also develop transformative and automated processes/systems that positively impact the business. This leader will identify inefficiencies, promote effective cost management initiatives, streamline the procurement process, harness analytic insights and build performance metrics and reporting for department heads.

Responsibilities

- The CFO has primary, day-to-day responsibility for planning, implementing, managing and controlling all finance-related activities of the Club. This includes direct responsibility for accounting, finance, forecasting, strategic planning, budgeting, human resources, payroll, benefits, legal, insurance, banking and compliance.
- The position works directly with the General Manager on operational and strategic issues; provides strategic recommendations based on financial analysis, revenue/expense analysis, projections and member utilization data.
- Provides recommendations to strategically enhance financial performance and business opportunities.
- Oversees long-term budgetary planning and cash flow analysis in alignment with Bent Tree's financial and strategic plan.
- Advises the Finance Committee regarding issues, trends and changes in the financial operations of the Club.
- Manages the budgeting process in coordination with department heads, and the implementation of approved budgets; monitors progress toward achieving budget goals and presents operational issues and opportunities.
- Assists the Club's CPA firm with the preparation of the Club's annual state and federal income tax return.
- Facilitates the Finance Committee; reports on the financial condition of the Club, sets agenda, prepares necessary reports and regularly communicates with the Finance Committee chairman.
- Prepares budgets and financial forecasts in coordination with the various committees,

department heads and the General Manager.

- Becomes thoroughly knowledgeable of the Club's bylaws, rules and regulations, organization structure and membership procedures.
- Manages the operating and capital funds of the Club.
- Formulates accounting procedures to facilitate Club operations including cash controls, bank deposits, petty cash, payroll policies, member billings and collection of Accounts Receivable.
- Ensures that finance staff maintains financial systems in accordance with Generally Accepted Accounting Principles and monitors the use of all funds.
- Oversees the preparation and approval of all financial reporting materials; monitors the monthly operating results as compared to budget, advises management about variances, and works closely with General Manager to keep costs under control.
- Provides department managers with direction and guidance on the financial implications of business activities.
- Manages all audit activities, including implementing and monitoring sufficient internal controls and segregation of duties to maintain the integrity of the Club's assets.
- Reviews all finance and HR-related procedures, processes and administration, recommending improvements to the systems in place and managing the systems going forward.
- Supervises payroll preparation, disbursements, bank reconciliations, distribution and all wage and hour compliance.
- Evaluates and manages all benefits programs, providing competitive packages for employees while meeting budgetary demands.
- Serves as Administrator for the employee 401(k) program and on the Club's 401(k) oversight committee.
- Evaluates and manages all banking and borrowing-related activities.
- Evaluates and manages all insurance-related activities.
- Maintains a strong industry awareness and consistently works to improve industry knowledge and expertise.
- Sets and maintains operating procedures within the Accounting Department to include accounting support staff.
- Models core values, including professionalism, integrity and exceptional service and quality.
- Inspires a shared vision, fosters collaboration and recognizes the contributions of others.

Attributes

- An outgoing and friendly personality with a high potential to identify with and embrace the Club's unique culture.
- Highly energetic; a self-starter with a “hands-on” approach to management.
- A strong sense of service with proven staff development and training skills.
- Ability to establish and maintain effective working relationships with all staff. Teamwork is the foundation of the Club's success.
- Resolves common problems and challenges regularly with high judgment.
- Determines the best method to achieve goals and maintains the flexibility to ensure effective delivery of work. Continuously delivers high-quality results and is resilient in the face of obstacles.
- Fosters a collaborative team spirit. Actively helps and supports others. Deals with conflict in a positive manner.
- Understands all the key departments and functions and how they work collectively to achieve larger goals. Provides advice, information and direction to others to support the achievement of team and/or department goals. Recommends optimal approaches to address critical issues in

the immediate and medium-term.

- An intelligent and articulate individual who can relate to people at all levels of an organization and possesses excellent written and oral communication skills. Must be able to communicate policies, procedures, regulations, reports, etc., to staff, members and guests.
- Provides exceptional member service and uses prompt and responsive follow-through. Ask questions to identify members' needs and/or expectations. Ability to respond effectively to the most sensitive inquiries or complaints.
- Able to work in a rapidly changing work environment. Must be able to adapt to changes, manage competing demands and deal with frequent changes, delays or unexpected events.
- Remain open to others' ideas and exhibit a willingness to try new things.
- Ability to envision the Club's future and continually come up with ways to improve the entire member experience.

Requirements

- Bachelor's degree in Finance or a related field and experience that provides the required finance, knowledge, skills and abilities. A CPA would be viewed as a plus, but not required.
- Five years minimum experience as a Controller, CFO or similar position at a club or within a similar hospitality environment, resort or hotel.
- 5+ years of accounting experience in balance sheet reconciliation, accruals, G/L accounts, journal entries, variance analysis, preparing monthly financial reports, budgeting, bank reconciliations, preparing tax returns, annual audit preparation, forecasting, payroll, AR/AP, cash flow, policy and process development.
- Solid knowledge of GAAP and regulations.
- A career path marked with stability and professional achievement.
- A person of exceptional character - motivated, energetic, friendly, and dedicated to the profession. A friendly and outgoing personality with strong communication skills and high visibility.
- The professional will be a lifelong learner continuing research and understanding industry trends. Excellent verbal and written skills.
- Effective coaching/supervision/training of staff.
- The ability to operate a computer to enter, retrieve or modify data utilizing Microsoft Word, Excel, Outlook, PowerPoint, email, internet and other software programs at a high level of proficiency.
- Strong working knowledge of Microsoft suite.
- Knowledge and implementation of accounting software is preferred
- Impeccable and verifiable references. All candidates will be subject to a thorough background check.

Competitive Compensation

- Competitive compensation/salary and an annual performance bonus.
- Healthcare, Medical, Dental and Life Insurance
- Paid Time Off
- Participation in the Club's 401(k)
- Professional dues, educational allowance expenses and other expenses per the annual budget
- Relocation Assistance

Professionals who meet or exceed the established criteria are encouraged to send a compelling cover letter addressed to Dan Burkett, General Manager / Chief Operating Officer outlining their qualifications, experience, interests and why Bent Tree Country Club and Dallas, TX will be beneficial for you, your family and your career along with their resume to:



Tara Osborne

Principal



tara@gsiexecutivesearch.com



512-965-5643

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