

CANDIDATE PROFILE

Controller

Boca Grande Club
Boca Grande, FL

www.bocagrandeclub.com



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The Organization

The Boca Grande Club, founded in 1978 by four prominent Floridians, was created as an exclusive beach and tennis retreat. Its uniqueness lies not only in its private setting, but in its extraordinary location on the north end of Gasparilla Island in Boca Grande, a distinction of true significance. Thirty-one years ago, the Boca Grande Homeowners Association (Master Association) proudly acquired the Club from its original developers, ensuring its legacy for generations to come.

The Club facilities, spanning 65 acres of lush tropical grounds, include one of the most beautiful beaches in southwest Florida. The fabulous clubhouse, with its floor to ceiling windows, overlooks the beach and gulf waters and offers fine and casual dining on two different levels. The view takes in the entirety of Gasparilla Island and includes incredible sunsets each evening.

The Tiki Bar and pool deck offer additional popular meeting, drinking and dining opportunities. The Club has eight Har-Tru tennis courts, a fully stocked Pro Shop and a very active tennis program managed by the tennis director and two tennis professionals. The Fitness Center is state of the art and offers two fitness instructors. In addition to the main pool and deck there are two additional pools. The Club also offers various services to the homeowners.

The Club is open 12 months with a nominal shutdown period for Food and Beverage. There are approximately 105 employees in all departments and divisions.

Full Membership is offered to the 297 onsite homeowners. Social Membership, although currently full, is offered to those who live in the surrounding area. The Club also has a robust seasonal rental program with a lifetime limit of 30 rental days before a person is required to join the Club.

BOCA GRANDE CLUB/HOA DETAILS

- Gross Volume Club: \$9.4M
- Gross Volume BGHA: \$1.5M
- New Member Fee: \$50,000

- New BGHA Homeowner Fee \$15,000
- Annual Dues Volume Club: \$3.06M
- Number of Doors: 297
- Number of Social Members: approx. 395

Position Overview

The Controller reports to the CEO and is a key member of the senior staff, responsible for keeping the books of The Boca Grande Club and the Boca Grande Homeowners Association, Inc. (BGHA) as well as the 14 condominium associations. There are two people in the accounting department who report to the Controller.

Responsibilities

FINANCIAL STRATEGY & LEADERSHIP

- Serve as a strategic advisor to the CEO and Board of Governors on all financial matters.
- Lead the development and implementation of financial strategies that support the Club's long-term goals and sustainability.
- Oversee short- and long-term financial forecasting.
- Attend regular and special Board meetings of the Club and BGHA and prepare minutes as requested by the CEO.

BUDGETING & FINANCIAL PLANNING

- Actively work with the CEO and Senior Staff in the formulation of the annual operating and capital budgets including detailed projections and justifications.
- Prepare and maintain departmental variance reports for the CEO.
- Provide project-based recording of capital expenditures and improvements.

ACCOUNTING & FINANCIAL OPERATIONS

- Ensure the timely and accurate preparation of monthly financial statements and reports.
- Maintain best-in-class accounting practices in compliance with GAAP and internal control standards.
- Reconcile all balance sheet accounts monthly for the Club and BGHA.
- Coordinate the external audit process and provide accounting firm with the information they need in an orderly and timely manner.
- Manage all tax filings and ensure ongoing preservation of the Club's tax-exempt status.
- Track and report all unrelated business income and ensure compliance with IRS regulations.

INTERNAL CONTROLS & RISK MANAGEMENT

- Assist in the development and monitoring of internal control systems to protect Club and BGHA assets and maintain financial integrity.
- Oversee all banking relationships and cash flow strategies.
- Coordinate with and external advisors on benefits administration.

TEAM LEADERSHIP & COLLABORATION

- Direct the other members of the accounting team in the fulfillment of their duties.
- Provide mentorship, training and performance coaching to team members, fostering a high-performance culture.
- Ensure collaboration and communication across departments by supporting senior staff with timely financial data and insights.
- Contribute to a positive, ethical and service-driven leadership culture in alignment with the values of the Boca Grande Club.
- Support the CEO in strategic initiatives, including member communications, capital campaigns and long-range planning.

Skills, Background & Personality

- Verifiable experience in accurate and timely maintenance of all financial information.
- Proven experience with financial modeling, strategic planning and capital project financing.
- Technologically fluent, with the ability to leverage systems and software for efficiency and decision-making.
- Experience with Jonas Club Software is preferred.
- Exceptional interpersonal, verbal and written communication skills.
- High personal and professional integrity, discretion and sound judgment.

Qualifications

- Bachelor's degree in Accounting, Finance or Business Administration required.
- Certified Hospitality Accounting Executive (CHAE) desirable.
- Minimum five years of progressive financial leadership experience, ideally in the private club, hospitality sector.
- Progressive career track which demonstrates stability and upward movement.
- Impeccable and verifiable references. All candidates will be subject to a thorough background check.

Competitive Compensation

- Competitive compensation/salary and an annual performance bonus.
- Medical, Dental, Vision and Life Insurance.
- Paid time off and work/life balance.
- Participation in the Club's Simple IRA plan.
- Professional dues, educational allowance expenses and other expenses per the annual budget.
- Relocation assistance (if from outside the area).

To be Considered

Professionals who meet or exceed the established criteria are encouraged to send a compelling cover letter addressed to GSI Executive Search outlining their qualifications, experience, interests and why The Boca Grande Club will be beneficial for you, your family and your career along with their resume to:



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