

BRAND K PARTNERS

Director of Client Management Ideal Candidate Profile

Do you want to use your accounting skills to make a difference?

Brand K Partners, a rapidly growing financial management firm serving nonprofit organizations, is recruiting a Director of Client Management who is passionate about ensuring that its clients – organizations serving our communities – are operating with the full benefits of sound accounting and financial management practices.

Brand K Partners

Brand K Partners, located in North Haledon, New Jersey, is a passionate team of highly skilled individuals devoted to improving the operational efficiencies of small to mid-sized nonprofit organizations. We work with our clients to create customized, affordable solutions to serve their bookkeeping and financial management needs.



Founded in 2013, Brand K Partners currently serves more than 40 small and mid-sized nonprofit clients a year and is on track to double that number in the coming year. To serve its growth, Brand K plans to increase the number of staff from 14 to 25 during that time frame as well. The firm has a reputation for bringing high value to its nonprofit clients with hands-on, timely and cost-effective service. Working both on and off site, Brand K consultants provide a full spectrum of financial services from bookkeeping to board presentations.

Our Clients

Brand K Partners helps clients do what they do best, whether it is feeding the hungry, housing the homeless, protecting human rights, providing critical health services to the underserved, strengthening education, or bringing art and music into our communities. We are passionate about the work that our clients do in the community, and we have earned a reputation for providing them with the services and guidance they need to achieve their goals.

Brand K has gone above and beyond to assist our small homeless shelter manage our finances, rather than letting our finances manage us! Always available, the Brand K team has worked with us to assist us in meeting all of our financial

deadlines, facilitated a revision of internal controls and made sure that we established best practices.

Matthew Janeczko
Executive Director and CEO, Fox House

We are so proud to be working with Brand K Partners. Our financial situation was challenging and, as a church, our infrastructure was stretched thin. Brand K Partners came in, sorted through our situation, and has kept us on track ever since. Mary Beth King has the patience of a saint.

Mary Puryear
Treasurer, Elmwood United Presbyterian Church

Our Services

Brand K Partners provides high quality financial management services to ensure that its clients are operating on sound accounting and financial practices.

Bookkeeping

We provide bill payment, recording, invoicing and account reconciliation services without the expense of a full-time bookkeeper. We not only leverage our nonprofit accounting expertise, but we also make use of systematic processes and procedures to deliver proactive insights and manage clients' accounting needs accurately, on time and on budget.

Financial Reporting and Management

We compile and manage customized financial reports to meet our clients' needs. Each month, we formally close clients' books and provide a series of documents including, but not limited to executive summary, budget vs. actual, balance sheet, statement of cash flows, statement of functional expenses, accounts receivable schedule and accounts payable schedule. Reports are reviewed in depth with the organization's executive team, enabling improved strategic planning and fiscal governance.



Audit Preparation

We manage the overall audit process and ensure a smooth and efficient audit experience. We work closely with the client's executive team and external auditor to optimize efficiencies and workflow.

Budget and Forecast Assistance

We create, manage, and help implement clients' annual budget and forecast process. We work alongside the client organization's team to understand how they operate to develop a budget and forecast plan that meets their fiscal needs.

Strategic Financial Planning

We develop a long-term fiscal plan for clients to optimize their budget while preparing for future expenditures. Plans incorporate key revenue streams and ongoing expenses, to enable the organization's executive team to make critical, future organizational decisions.



Financial Management Assessments

We perform a thorough analysis of clients' accounting and finance functions. A team of highly skilled, CFO-level staff assess their financial systems, operations and governance, and provide detailed recommendations for improvement.

The Role of the Director of Client Management

The Director of Client Management will manage client-firm relationships, serving as the point of communication between the two and ensuring that the client is experience a high level of service and support from the Brand K team. The ideal candidate will be adaptable to the unique nature of the nonprofit culture and will share our clients' passion for community service.

Reporting to the Vice President of Client Services and managing a team of six direct reports, ranging from staff accountant to accounting manager, the Director of Client Management will be part of our efforts to strengthen our brand and distinguish our firm as a leader in providing financial management support to the nonprofit community. This position has three primary areas of responsibility: Client Relationship Management, Team Management, and Operational Management.

Client Relationship Management

- Ensure that clients have a positive experience with Brand K Partners
- Communicate well and consistently with clients
- Present financials to the client's executive team and /or board of directors, highlighting and interpreting key information
- Provide clients with strategic fiscal guidance
- Actively participate in the new client onboarding process
- Manage client expectations and trouble-shoot issues in a timely manner

Team Management

- Monitor staff workload, optimize team resources
- Foster open communication among team members by holding weekly team meetings
- Monitor monthly book closes/audits to ensure timely completion
- Bi-monthly connection with each team member individually
- Encourage team members' professional development

- Prepare employee mid-year and end-of-year performance review and professional development plans

Operational Management

- Oversee preparation of and analyze financial statements on a monthly basis
- Prepare budgets and fiscal projections
- Provide supervision and direction to direct reports
- Monitor the efficiency of work processes and make improvements when possible
- Attend client finance committee meetings and/or board meetings upon request
- Perform ad hoc accounting tasks on an as-needed basis

Ideal Candidate Qualifications and Experience

The ideal candidate will have knowledge of sound accounting and financial management practices, particularly as they apply to nonprofit organizations; high-level communication skills to ensure a top-tier client experience; and the experience and ability to guide, mentor and support members of the Brand K team, particularly those who are junior level.

Education and Skills Required

- Bachelor's degree in accounting or finance; CPA or MBA are a plus
- Minimum of five years of management experience within an accounting or finance department
- Knowledge of nonprofit accounting is required
- Strong understanding of Generally Accepted Accounting Principles (GAAP)
- Computer literacy in Microsoft Excel, QuickBooks and Fund-EZ

Ideal Candidate Competencies

- Independent, self-starter with the ability to plan and prioritize work schedules
- Ability to multi-task and work with multiple clients/staff members
- Ability to build sustainable client relationships and trust with client accounts
- Superior oral and written communication and presentation skills
- Commitment to the mission, vision and values of Brand K
- A strong team collaborator
- Demonstrated ability to lead and supervise the work of others
- Ability and willingness to travel to client sites as required

This position is based predominantly in the firm's North Haledon office with some travel within the New York/New Jersey region, and will operate on a hybrid basis with two to three days at the firm's offices or at a client location.

Compensation Package

Brand K Partners offers a competitive compensation package that includes the following after 90 days of employment:

- Health coverage (Oxford) - Brand K covers the lower of 75% employee cost or \$500
- Vision/dental coverage (Delta Dental) - Brand K covers 100% of the employee cost (spouse/dependents are the employees' responsibility)
- Long-term disability/life coverage (\$50,000) - Brand K covers for the employee
- After two years of employment the firm offers a simple IRA plan and contributes 2% of the employee's salary.

In addition, Brand K offers its employees an ample vacation/personal/sick day package, longevity rewards, client and employee referral bonuses, and year-end bonuses.

The Director of Client Management position at Brand K Partners offers an opportunity to work with a strong, experienced team that is passionate about the work of its clients. We value work-life balance and encourage personal and professional growth.

Contact Information for Interested Candidates and Nominations

If you would like to express your interest in this position or would like to nominate a candidate, please send a cover letter and resume to Michele Hickey, Executive Vice President, at michele@dcm-associates.com. Please feel free to call Michele at 201-803-7587 if you have any questions.



*Executive Search
Nonprofit Leadership
& Board Performance*

August 11, 2021