**Controller**

**Department:** Wheaton Academy Business Office

**Reports To:** Wheaton Academy COO / CFO

**Classification:** 12-month staff position

**Hours:** Full-time

**Benefits:** Applicable per designated classification

**Prepared Date**: 2020

**Job Summary:** The *Controller* oversees the financial operations of Wheaton Academy, including finance management, banking, financial aid and tuition accounts, budgets, and insurance. This person also supervises the Accounts Payable Coordinator and Accounts Receivable Coordinator.

**Essential Duties and Responsibilities include the following. Other duties may be assigned:**

1. **Financial Management**
   1. Maintain general ledger for Wheaton Academy, Wheaton Academy Institute, and Wheaton Academy Foundation
   2. Have overall internal audit responsibility for all three entities
   3. Act as chief liaison between Wheaton Academy & Auditors to insure annual audit is completed
   4. Prepare documents for Finance & Audit Committee meetings (5 times annually); attend meetings & take minutes; provide documents for Board Package
   5. Create monthly, quarterly, and annual financial reports for management review
   6. Work with CFO/COO to create and monitor the five-year financial plan within parameters
   7. Work with CFO/COO to create and monitor the annual operating budget within parameters
   8. Create and manage Wheaton Academy cash flow needs within policy
   9. Complete IRS reports/requirements
   10. Implement collection procedures per policy
   11. Maintain working knowledge of all accounting and bookkeeping functions
   12. Supervise and assist Accounts Receivable and Account Payable Coordinators with accounting functions as needed
   13. Keep the CFO/COO informed of all financial measurements and compliance regulations
   14. Implement school priorities and strategic initiatives established through regular interaction with CFO/COO
   15. Assist CFO/COO with projects/assignments as requested
   16. Provide recommendations for improvements and implement new “best practices” systems
   17. Document procedures and create repeatable systems
2. **Banking**
   1. Work directly with Wheaton Academy’s banking institutions
   2. Maintain appropriate account balances
   3. Bank reconciliation
3. **Financial Aid** 
   1. Review all requests for financial aid
   2. Prepare financial aid requests in format for Financial Aid Committee to review
   3. Meet with Financial aid committee to present financial aid requests
   4. Monitor amount of aid distribution
   5. Issue awards using the FACTS system
4. **Tuition / Local Student Records:** Oversee enrollment contracts
5. **Budget:**
   1. Collect budget requests for next fiscal year
   2. Compile department and operating budget requests and present to supervisor for review and approvals
   3. Distribute approved budget amounts to budget managers
   4. Work with budget managers to assist with questions
   5. Maintain Capitalization budget and track progress with Accounts Payable Coordinator assistance
   6. Work with International Student Program Director to build budget for tuition and boarding program, including financial aid.
   7. Provide ongoing documentation and communication regarding budgets
6. **Insurance** 
   1. Liaison with insurance providers – process renewals and assist with claims as necessary.
      1. Property insurance
      2. Workers compensation insurance
      3. Student accident insurance, including student catastrophic accident insurance
      4. Winterim / International travel insurance
      5. International Student health insurance

The*Controller* must be a spiritually sensitive individual who understands the mission of Wheaton Academy and is committed to help see it become a reality in the lives of our students by manifesting, by precept and example, the highest Christian virtue and personal decorum, serving as a Christian role model (I Timothy 4:12) both in and out of school (Luke 6:40), and as an example to parents and fellow employees in judgment, dignity, respect, and Christian living. This individual must maintain active participation in a protestant evangelical church.

The ideal candidate will have Bachelor’s Degree (B.A. or B.S.) in Accounting, Business Finance, or equivalent as well as significant financial and/or accounting work experience. C.P.A. certification is preferred. The ideal candidate will also have experience with *Financial Edge*. This person must possess a strong work ethic; enjoy problem solving; and be able to work independently. He or she must also be able to communicate professionally and patiently with parents, students, and colleagues. The ability to handle large amounts of confidential information especially as it relates to families attending Wheaton Academy is required. In addition, this individual will support the decisions made by the Executive Team as it relates to tuition accounts, financial aid, and any other items.

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed above are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.