Chief Financial Officer

Copic Job Description

JOB OVERVIEW	
JOB TITLE	Chief Financial Officer
DEPARTMENT	Finance
FLSA CLASSIFICATION	Exempt
REPORTS TO	Chief Executive Officer

JOB SUMMARY

This position is responsible for managing the finance and accounting functions for the Company. As such, the position provides the necessary financial and accounting resources, policies, procedures, and controls to Copic officers and all departmental staff to ensure the Company's financial integrity.

KEY RESPONSIBILITIES

- **Management of all Financial & Accounting Functions**

  Percent of Time: 50%

  - Assure that sound, efficient financial controls are in place for Copic.
  - Provide financial reporting data on a timely and accurate basis to the Company, including the Audit Committee and various members of the Board.
  - Monitor compliance with all regulatory requirements including the timely and accurate reporting to such agencies.
  - Administer the Asset Management Program and Enterprise Risk Management Program.
  - Report on Investment Activities. Assure that investments are consistent with Company investment strategies, income tax planning, and regulatory guidelines.
  - Provide support for all accounting and reporting activities for all Copic-related entities. This includes claims accounting and reporting, long term care reporting, current tax provisions, deferred taxes, premium reconciliation, surplus roll forward, internal and external regulatory financial statements, related statutory filings, and general sign off financial statements.
  - Coordinate and manage all financial related audits and maintain positive banking relationships.
  - Assure the acquisition, implementation and maintenance of adequate systems to maintain integrity, reliability, accuracy and retention of financial information
  - Trustee of Copic's Retirement Plans.

KEY RESPONSIBILITIES CONTINUED…

- **General Leadership & Manager**

  Percent of Time: 50%

  - Although day-to-day responsibilities for interviewing, hiring, evaluating, disciplining and terminating employees may be delegated to staff members, the final decision in such matters is approved by the incumbent.
  - Assure the acquisition, development, training, supervision and evaluation of departmental staff.
  - As a member of the Copic Management Team, shares responsibility for meeting overall Copic Companies operational goals. Participates fully in department head strategic planning efforts.
  - Prepares and administers departmental budget, develops departmental business plans in support of corporate strategies and goals, manages departmental resources to meet goals, objectives, and budget targets set forth in the Copic business plans and budgets.
  - Demonstrates leadership by example; promotes teamwork; fosters personal growth of employees; trains, coaches and mentors employees to succeed in their jobs and at Copic; completes timely performance evaluations in accordance with Company policy; cross trains personnel in order to ensure continuity of service quality; ensures good housekeeping, safety, and cost control practices throughout the work unit.
  - Develops and implements policies and procedures necessary to accomplish the work of the department.
  - Participates in on-going professional development seminars and classes.
  - Keeps current on financial, accounting, and other related literature and surveys to determine how changes in the business/legal environment may impact Copic's practices

REQUIRED QUALIFICATIONS & SKILLS

- Degree in Finance or Accounting.
- 10-15 years current experience directing all phases of the finance and accounting department in a company with at least $25M in revenue.
- Proficient in Microsoft Office Products and other financial, investment, and accounting systems.
- Excellent verbal and written communication.
- Strong aptitude for seeing the "big picture" but not at the expense of paying attention to necessary details.
- Ability to work effectively with others in a variety of business situations, including board members and all staff
- Have a high level of energy with the ability to adjust to any justifiable pace.
- Use a persuasive style of management and the "seller" approach when accomplishing things through people.
- Excellent leadership skills.
- Makes sound business decisions.
- Exhibit behavior which emphasizes quality, loyalty and conscientiousness.
- Excellent analytical & critical thinking skills
- Excellent customer service skills
- Champions change
- Public speaking & presentation skills

DESIRED QUALIFICATIONS & SKILLS

- Master's in Business Administration, Finance, or a related field.
- CPA certification.
- Experience in analyzing new business opportunities and in mergers and acquisitions.

WORKING CONDITIONS

- Typical Office Environment
- Hybrid Schedule. Office located in Denver, Colorado
- Occasional out-of-town, overnight travel required
- Schedule
  - Full-Time, 40 hours per week, long or unusual hours as needed, sometimes on short notice
  - Business Hours: 8am-5pm MST

About Copic

Copic's mission is to improve medicine in the communities we serve. We strive to be the premier diversified service organization providing professional liability insurance and other needs of the health care community through advocacy, innovation, and the commitment and dedication of our employees.

We offer competitive wages, a comprehensive and highly sought-after benefits package, and a great work environment with fun, friendly people who truly enjoy their work. Hiring range for this position is $352,475.87/annually to $440,594.84/annually.

***Disclaimer**: This is not meant to be comprehensive. Job duties and/or qualifications are subject to change depending on business need.*