



VICE PRESIDENT, CHIEF OPERATING OFFICER/ CHIEF FINANCIAL OFFICER

Job Brief

This hybrid position is responsible for overseeing ClearPoint's day to day operations, standard procedures and the overall efficiency of the bank in addition to planning, implementing, managing and controlling the administrative, financial and risk management aspects of the bank. The COO/CFO will oversee all operational, technological and financial activities of the bank, report directly to the President and serve as a key member of the senior management team.

ESSENTIAL DUTIES AND RESPONSIBILITIES Other duties may be assigned.

Operations

1. Oversee all operational areas of the bank, including trust processing, reporting and information technology and implement best practices.
2. Provide leadership and direction to supervised areas staff. Ensures that staff is well trained, effective and optimally used. Monitors individual performance and effectiveness.
3. Participate in key decisions as a member of the senior management team
4. Oversees all customer pricing and manages cost models
5. Maintain key vendor relationships

Risk Management

1. Understand and mitigate key elements of the Bank's risk profile
2. Evaluate interest rate model outputs, and provide analysis for the investment committee
3. Report risk issues to the audit committee
4. Maintain relations with external auditors and investigate their findings and recommendations

Planning

1. Provide leadership in evaluating short-term and long-term strategic objectives
2. Collaborates with senior management team to formulate the company's future direction and support tactical initiatives
3. Develop financial and corporate tax strategies and performance measures that support the company's strategic direction
4. Oversee the capital request, budgeting and forecasting processes
5. Oversee employee benefit plans



Financial Information

1. Oversee the issuance of financial information. Review any financial information being released to potential investors or others outside the company.
2. Ensure credibility of Finance group by providing timely and accurate analysis of budgets, financial trends and forecasts in order to assist the President, the Board, and other senior managers in performing their responsibilities
3. Report financial results and analyses to the board of directors
4. Ensure that effective internal controls are in place and ensure compliance with GAAP and applicable federal, state and local regulatory laws and rules for financial and tax reporting

Funding / Treasury

1. Ensure that sufficient funds are available to meet ongoing operational and capital investment requirements
2. Maintain banking relationships
3. Invest excess funds and manage the Bank's investment portfolio
4. Monitor 401-K investment options
5. Advise management on the liquidity aspects of its short- and long-range planning
6. Maintain a system of policies and procedures that impose an adequate level of control over treasury activities

MINIMUM REQUIREMENTS

- Bachelor's degree in finance, business administration or related field or equivalent work experience.
- Seven years of financial institution experience with an emphasis on operations and finance.
- Working knowledge of bank regulations and services, trust or deathcare experience a plus.
- Experience with financial analysis and customer pricing
- Excellent interpersonal, leadership and supervisory skills. Five years' experience managing others.
- Demonstrated problem solving, decision making and communication skills, both written and spoken
- Ability to work in a team environment
- Continuous improvement mindset. Must take initiative and address issues proactively.
- Ability to coordinate and complete multiple tasks in a timely and efficient manner