

## Role Summary: Controller

Reporting to the Chief Financial Officer, the Controller is a management position responsible for executing and overseeing the financial compliance and efficiency of the operating entities under Wingspan Capital (“the Enterprise”). This includes Royal LePage Brokerages, CarePoint Medical and Wellness Centres, and related corporations (“Companies”) business lines, and internal financial functions. The Controller works closely with and must understand conveyance functions, medical billing, overall operations of the companies and their value propositions.

## Outcomes

This position is responsible for the achievement of the following outcomes:

**Compliance:** Companies meet and exceed regulatory requirements, and internal audit and risk mitigation practices are in place and used for quality improvements.

**Efficiency:** Companies have financial processes that make sense, are focused on timeliness, make the best use of resources, minimize bottlenecks, and eliminate single person dependency.

**Effectiveness:** Financial teams deliver results to realtors, physicians, and internal and external stakeholders.

**Issue resolution:** Finance teams function in a culture of identifying and resolving issues to foster learning, improve processes, and sustain a positive working environment.

## Responsibilities

### Financial Administration:

- Oversee and ensure the timely and accurate completion of financial administration tasks in the Companies and corresponding recordkeeping
- Ensure a professional level of service is provided to realtors, physicians, managers and other internal and external stakeholders
- As the appointed banking administrator, oversee all aspects of the banking platform functionality, user permissions and approval of daily financial transactions
- Ensure financial administration is documented, records and files are stored correctly, and there is minimal single-person dependency
- Demonstrate proficiency in conducting financial administration tasks and troubleshooting complex issues or questions
- Develop a high level of technical proficiency with software used by the Companies (including Lone Wolf, QuickBooks, Xero, EMRs, Google Workspace, Microsoft 365, etc.)
- Prepare month-end financial statements and reporting packages and ensure compliant review/signing of bank reconciliation for all bank accounts

- Prepare fiscal year-end files, liaise with accountants, complete year end entries and ensure financial reporting is submitted in compliance
- Plan and remit all taxes including GST and Corporate Income Tax
- Support annual audits and/or trade audits

### **Human Resource Management and Payroll:**

- Manage financial administration staff in accordance with BC Employment Standards and Companies' policies
- Ensure efficient and effective staffing structures across the finance, conveyance, and billing teams, including shared staff with other responsibilities
- Support Team Leads in conveyance, property management, and billing teams to remedy errors and correct financial implications (e.g., trade errors, incorrect GST application, international funds)
- Support the Operations Manager, Manager of Growth & Retention, and Care Point Regional Manager in financial decision making
- Undertake regular performance reviews and coaching of team members in finance or with those with financial responsibilities (e.g., those managing expense budgets)
- Administer staff payroll, benefits, and other sensitive tasks that require confidentiality
- Lead staffing changes including hiring, vacation approval, performance management initiatives and departures for the finance and conveyance teams
- Ensure that all payroll and performance documentation is up to date and stored correctly
- Participate in corporate events such as fundraising events, social events, and conferences

### **Strategic Financial Reporting:**

- Participate on the Management Team, reporting on metrics, performance, realtor feedback and compliance
- Work with management and executive team to leverage financial information
- Prepare and actively manage the budgeting/forecasting process and monthly budget reports
- Identify and monitor internal controls (key financial metrics) and areas of risk (revenue or expense related) and bring to management's attention
- Generate sales statistics, capacity statistics, and contribute to benchmarking studies using financial and other sources of data
- Work with management to improve financial policies and procedures for customers and operations (e.g., advances, charges)
- Provide ad-hoc information, analysis and charts/graphs as requested, particularly in supporting due diligence or acquisition analysis
- Ensure that all strategic reports and analysis are comprehensive, carefully considered, accurate and fit for purpose

## Approach

- Mentor, counsel, coach and support those who are not confident in their area of responsibility, building capability and confidence. Motivate people to give their best results, praising them when things go well and appraising them of improvements which can and should be made.
- Encourage thoughtful exchange of ideas between team members to create new options and imaginative solutions to difficult problems.
- Be non-confrontational when handling or involved in conflict situations with realtors, physicians or internal/external stakeholders. Seek to understand their perspective and work to achieve agreed and acceptable solutions that preserve short and long term relationships.
- Recognize and take advantage of the opportunity to build financial infrastructure and capacity of a growing enterprise in a rapidly changing business environment.

## Education and Experience

- An Accounting or Finance diploma and a CPA designation is required
- 2+ years of post-qualification experience is required, with experience in the private sector preferred
- Strong knowledge of financial regulations, GAAP, and legislation
- Experience managing and coaching financial teams
- Excellent computer skills including G-suite and Microsoft 365 with proficiency in Lone Wolf, QuickBooks, Xero, and EMRs beneficial to conduct a full range of financial tasks.
- Proven experience with online banking platforms

## Skills and Abilities

- Strong bookkeeping and accounting skills with the ability to undertake, question, and improve processes
- Ability to ensure that finances are accountant-ready, and identify when accountant advice is needed
- Ability to troubleshoot and find solutions
- Ability to work in a fast paced environment
- Excellent eye for detail and meticulous review of contracts, documents and/or financial records
- Excellent communication skills and relationship building skills
- Flexibility and team spirit with a willingness to work collaboratively to meet business needs
- Willingness to learn new skills, contribute ideas, voice concerns and strive to improve processes
- Positive, solution-oriented, organized, detail-oriented and a team player
- Understands the bounds of authority and when to escalate or communicate issues.

## Work Environment

- Ability to work from multiple locations as needed and take part in travel as required
- Ownership of a vehicle is preferred

***Disclaimer Clause:*** *The above statements are intended to describe the general nature and level of the work being performed by the employee assigned to this position. There is no exhaustive list of all duties and responsibilities, knowledge, skills, abilities, physical job demands and working conditions associated with this position.*