

Chief Financial Officer Search
Fall 2026

MONTREAT®
CONFERENCE CENTER

Chief Financial Officer

The Opportunity

Montreat Conference Center seeks a new Chief Financial Officer and aims to fill the position by the winter of 2026. As a ministry affiliated with the Presbyterian Church (U.S.A.), the organization seeks to serve individuals and congregations in their journeys of faith by Embodying Hospitality, Engaging Grace, Experiencing Connection, Cultivating Curiosity, and Stewarding God's Creation.

The Center has retained Big Back Pack to execute a national search for its next Chief Financial Officer.

The Mission of Montreat Conference Center is to gather in sacred spaces to explore, renew, and connect with our faith, our communities, and ourselves.

To Apply

Please email resume and cover letter to
Hacker Burr at hacker@bigbackpack.org

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Chief Financial Officer

The Organization

Montreat Conference Center is a private, non-profit, national conference center with roots in the PC(USA). The conference center often is referred to simply as “Montreat” by the more than 30,000 guests, conferees, and cottagers who pass through the Gate each year. While we are affiliated with the Presbyterian Church (U.S.A.), we also readily welcome groups and individuals outside the Presbyterian church to experience Montreat.

Nestled in the mountains of Western North Carolina, Montreat has served as a place of spiritual retreat for over 120 years. Each year, the conference center hosts dozens of programmed events, hundreds of retreats and conferences, and hosts thousands who seek renewal and rest. We welcome visitors of all races, faiths, and orientation. All are welcome here.



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Chief Financial Officer

The Position

The Chief Financial Officer (CFO) is a senior management leader responsible for the financial stewardship, financial strategy, and fiscal integrity of the Mountain Retreat Association (MRA, d/b/a Montreat Conference Center). Reporting to the President and serving as a member of the Senior Leadership Team, the CFO provides financial leadership that supports Montreat's mission, operations, and long-term sustainability.

The CFO oversees the organization's accounting and financial operations, budgeting and forecasting, financial reporting, cash and treasury management, investments and endowment accounting, internal controls, audit coordination, insurance and risk management, and other business and administrative functions assigned to the position.



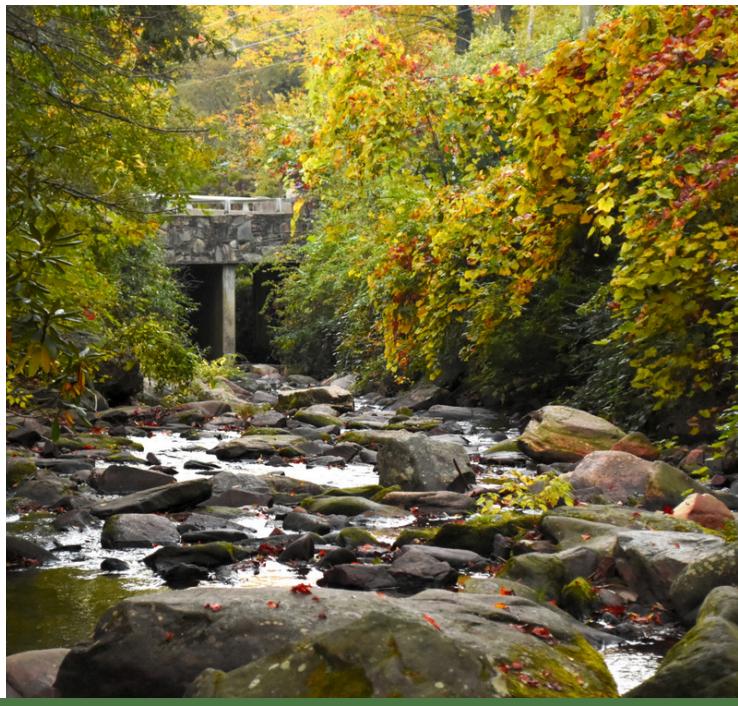
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Chief Financial Officer

Essential Duties and Responsibilities

- Provide financial leadership and counsel to the President, Senior Leadership Team, and Board of Directors, including assessment of financial risks, opportunities, and the long-term implications of significant organizational decisions.
- Participate in organizational strategy and long-range planning, ensuring that financial resources and priorities are aligned with Montreat's mission and strategic direction.
- Lead the development and coordination of the annual operating budget in collaboration with the President, department leaders, and other appropriate staff.
- Help leadership evaluate organizational performance, cash needs, capital priorities, and long-term financial sustainability.
- Monitor actual financial performance against budget; identify significant trends and variances; and provide timely analysis and recommendations to leadership.
- Provide executive oversight of accounting and financial reporting functions and ensure that financial transactions and records are accurate, complete, timely, and maintained in accordance with applicable accounting standards and organizational policies.
- Ensure timely preparation of monthly financial statements and other management reports, as well as financial information needed for quarterly, semi-annual, annual, and Board reporting.



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Chief Financial Officer

Essential Duties and Responsibilities Cont'd

- Ensure appropriate accounting and reporting for restricted and designated funds, endowments, investments, capital assets, charitable funds, and other specialized funds or accounts.
- Provide executive oversight of institutional payroll operations, ensuring accurate and timely payroll processing, appropriate internal controls and reconciliations, and compliance with applicable federal and state payroll tax, wage and hour, reporting, and recordkeeping requirements.
- Establish, maintain, and periodically evaluate appropriate internal controls, segregation of duties, financial authorization processes, and financial policies and procedures.
- Safeguard organizational assets and identify financial-control weaknesses or risks, recommending and implementing appropriate corrective measures.
- Coordinate the annual independent financial audit of MRA and related entities, serve as the primary liaison with the independent auditing firm, and ensure appropriate follow-up on audit findings and recommendations.
- Coordinate preparation of financial information required for applicable tax and regulatory filings, including Form 990 filings for MRA-related entities as applicable.
- Maintain awareness of accounting, tax, financial reporting, and regulatory requirements applicable to nonprofit organizations.
- Oversee organizational cash flow and liquidity, banking relationships, depository accounts, financing arrangements, debt obligations, leases, and other treasury matters.
- Monitor cash balances and recommend appropriate short- and long-term cash management strategies.

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Chief Financial Officer

Essential Duties and Responsibilities Cont'd

- Provide appropriate oversight and reporting related to organizational investments, the investment pool, restricted funds, and individual endowment funds; work with the Investment Committee, investment advisors, and financial institutions as appropriate.
- Serve as a principal financial resource to the Board of Directors and prepare and present clear, timely, and understandable financial information to support the Board's fiduciary responsibilities.
- Provide staff support to the Finance Committee, Audit Committee, Investment Committee, and other Board committees or subcommittees as assigned; attend meetings and follow through on financial matters arising from those meetings.
- Coordinate the organization's insurance program and relationships with insurance brokers and carriers, including annual coverage review and renewal, claims coordination, and evaluation of significant organizational risks.
- Provide financial analysis and feasibility review for significant capital projects, property matters, contracts, and other organizational initiatives, including evaluation of project costs, financing alternatives, operating implications, and long-term affordability.
- Coordinate with legal counsel regarding real estate and other business matters as appropriate.



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Chief Financial Officer

Essential Duties and Responsibilities Cont’d

- Participate, as assigned, in matters involving governmental entities, including planning, zoning, and other issues affecting Montreat's property or operations.
- Coordinate property-tax matters involving taxable and tax-exempt property and work with appropriate governmental authorities and professional advisors when necessary.
- Ensure that financial and accounting systems appropriately support organizational operations, reporting, internal controls, data integrity, and management decision-making.
- Maintain effective professional relationships with auditors, accountants, banks, investment advisors, insurance providers, legal counsel, governmental entities, technology providers, and other outside partners.
- Participate in the evaluation and implementation of financial technology and other business systems; provide oversight of broader information technology functions when assigned to the CFO's area of responsibility.



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Chief Financial Officer

Opportunities for the New CFO

- Enhance Organizational Effectiveness: The CFO will play a critical role in refining systems and processes to maximize the effectiveness of the Center's financial and operational outputs. By streamlining workflows and technological platforms and strategically using data, he/she will help boost both operational efficiency and financial outcomes.
- Team Development: The CFO must quickly build trust within a talented senior leadership team by creating a supportive environment grounded in modeling and high level communication.
- Build short and long-term strategic financial models in conjunction with the Center's Strategic Plan.
- Play a critical role in supporting and leading exciting capital projects during a time of transformational organizational growth.



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Chief Financial Officer

Leadership Responsibilities

- Provide supervision for Business Office/Finance staff, including establishing expectations and priorities, developing staff, evaluating performance, encouraging cross-training, and ensuring continuity of essential financial operations.
- Work collaboratively with department leaders throughout Montreat to strengthen financial understanding, budget accountability, and responsible stewardship across the organization.
- Provide supervision to the Maintenance Director and, through the Director, oversight of the maintenance team and its work; collaborate with the Director on departmental priorities, budgets, facility and infrastructure needs, preventive maintenance, and significant repair, renovation, and capital projects, including appropriate planning, budgeting, financial analysis, and project oversight.
- Represent Montreat professionally with Board members, donors, community partners, professional advisors, vendors, and other stakeholders.
- Perform other duties and responsibilities consistent with the nature and level of the position as assigned by the President.





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Competencies

- Demonstrate strong financial acumen and the ability to connect financial information to organizational strategy and decision-making.
- Think strategically and understand the long-term financial implications of organizational opportunities, risks, and decisions.
- Exercise sound judgment and use critical thinking, analysis, and available resources to solve complex problems.
- Communicate financial information clearly and effectively to staff, senior leaders, Board members, and other stakeholders.
- Lead and develop staff, establish clear expectations, provide constructive feedback, and promote accountability.
- Work collaboratively across departments and build effective professional relationships.
- Demonstrate integrity, discretion, and a strong commitment to responsible stewardship of Montreat's financial and institutional resources.
- Plan, prioritize, and manage multiple responsibilities and deadlines in a complex and seasonally changing organization.
- Exhibit strong attention to detail while maintaining an organization-wide and long-term perspective.
- Demonstrate respect for and commitment to Montreat's mission, history, values, and relationships.



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Education and Experience

- Bachelor's degree in accounting, finance, business administration, or a closely related field.
- Minimum seven years of progressively responsible financial or accounting experience, including significant responsibility for financial reporting, budgeting, financial analysis, internal controls, and financial planning.
- Minimum three years of management or senior leadership experience, including responsibility for supervising and developing staff.
- Demonstrated knowledge of generally accepted accounting principles (GAAP) and sound financial management practices.
- Experience developing organizational budgets, forecasts, long-range financial projections, and financial analyses.
- Experience working with external auditors and coordinating an annual audit process.
- Demonstrated experience preparing and presenting financial information to senior leadership, boards, governing bodies, or comparable decision-making groups.
- Ability to analyze complex financial and operational information and communicate its implications clearly to individuals with varying levels of financial expertise.
- Strong judgment, integrity, discretion, and ability to manage confidential and sensitive financial, personnel, legal, and organizational information.
- Demonstrated ability to work collaboratively across departments and to balance financial stewardship with organizational and mission priorities.



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Education and Experience Cont'd

- CPA, CMA, or comparable professional credential (Master's degree in accounting, finance, business administration, or a related discipline).
- Previous experience as a CFO, Controller, Finance Director, or comparable senior financial leader is preferred.
- Nonprofit financial management experience, including experience with restricted funds, endowments, charitable contributions, and nonprofit financial reporting, is strongly preferred.
- Experience working with a nonprofit board and finance, audit, or investment committees is preferred.
- Experience with hospitality, conference, retreat, educational, camp, property, or similarly complex and/or seasonal operations is preferred.
- Experience with capital projects, real estate, investment management, risk management, and insurance is preferred.



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Physical Requirements

This position requires the ability to sit for extended periods of time; use a desktop or laptop computer, including typing and viewing fine print on a computer monitor; and use a desk phone to place and answer calls. Reasonable accommodations may be made to enable qualified individuals with disabilities to perform the essential functions of the position.

Working at Montreat Conference Center

We are an equal opportunity employer and a great place to work or volunteer. Please note that all candidates must display a genuine interest in and passion for the mission of Montreat Conference Center and support its efforts in becoming an anti-racist, multicultural institution.

To Apply

Interested and qualified candidates should submit electronically in one email and as separate PDF documents the following materials:

- A cover letter expressing their interest in this particular position.
- A current résumé
- An annotated list of five professional references with name, phone number, and email address (references will be contacted only with prior candidate approval).

All materials should be sent via email to:

Hacker Burr
President and Managing Director
Big Back Pack LLC
Hacker@bigbackpack.org



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