

Finance and Asset Manager

June 2025

This is a full time, forty hour per week position reporting to the Controller. Responsibilities will include Finance bookkeeping support as well as Real Estate Asset and Stewardship management.

Finance Support

- Communicate with staff, collect reimbursement forms.
- Manage incoming invoices (mail/email) and maintain electronic files.
- Enter bills into QuickBooks Online (QB) and pay via check, EFT, ACH.
- Deposit checks in proper bank account.
- Enter deposits into QB.
- Manage QB entry/payment of credit card charges.
- Reconcile all bank accounts monthly.

Asset Management

- Analyze monthly operating reports for rental properties to ensure adherence to performance objectives.
- Ensure properties have adequate and effective insurance.
- File annual 3ABC forms and rental valuations to town assessors tax abatements.
- Act as primary liaison with our investors, limited partners, lenders, and funding agencies for portfolio operations in collaboration with external rental property managers.
- Work with Controller to coordinate the preparation of annual financial audits, tax filings and other reports required by investors and lenders.
- Track replacement reserves to ensure sufficient funding for capital improvement Implementation.
- External rental property management coordination, collaboration and oversight.
 - Oversee third party contracts for portfolio operations.
 - Conduct monthly meetings.
 - Coordinate the timely review, approval and submission of property budgets, compliance reports and inspections as may be required.
 - In collaboration with the Real Estate team, develop capital need plans and assist with implementation.
 - Lead and coordinate green energy initiatives to lower carbon emissions and improve efficiency at our properties.

Stewardship Management

- Facilitate regular communication with homeowners and renters (in partnership with Dukes County Regional Housing Authority – DCRHA and TCB) to increase community engagement.
- Adhere to the Ground Lease Collection Fee Policy and Procedure.

- Maintain communication and help CEO and homeowners/lessees, and homeowner associations regarding refinancing, home sales, post construction systems maintenance & repair.
- Attend local municipal meetings when appropriate.
- Organize Stewardship/Asset Management Committee meetings.

Skills and Qualifications:

- Demonstrated excellence in organizational, managerial, and communication skills.
- Excellent written and verbal communication skills.
- Capacity to manage multiple projects simultaneously.
- Excellent computer skills. Regular use of Microsoft, Word, Excel, QuickBooks (preferred but we will train).
- Interest in and commitment to affordable housing, sustainable economic development and fostering a healthy island community.
- Ability to work well with diverse individuals and balance a variety of needs.

Experience:

At least 5 years of office and administrative operational experience.

- Financial and/or construction background preferred.
- College degree or technical/certificate training preferred.