

CBV INSTITUTE

Manager - Finance, Analytics and Corporate Support

Job Description

- Job Type:** Permanent, Full-time
Location: Hybrid (Head Office is in Toronto, ON Canada)
Experience: A minimum of five (5) years of experience in progressive finance roles, including at least one year in a management role

The Organization:

The Canadian Institute of Chartered Business Valuators (operating as CBV Institute) is Canada's only professional organization dedicated to education and accreditation in business valuation, since 1971. With CBVs and Registered Students across Canada and around the world, we uphold the highest standards of business valuation practice through education, accreditation and governance of the CBV, for the benefit of the public interest. We are currently looking for an experienced, process-orientated professional to join our dynamic team.

The Role:

We are seeking a highly capable and detail-oriented Manager – Finance, Analytics, and Corporate Support to join our team. This role combines the core responsibilities of a financial leader with opportunities to contribute meaningfully to data analysis and broader corporate operations. Reporting directly to the President & CEO, the Manager – Finance, Analytics, and Corporate Support will be a key position responsible for leading the finance function of the Institute.

The ideal candidate is comfortable owning day-to-day financial operations while also bringing curiosity, forward analytical thinking, and a collaborative mindset to support informed decision-making across the organization. This is a hybrid role, with an expectation of being in the office on a part-time basis and is ideal for a financial professional looking for a better work/life balance.

What We're Looking For:

- A hands-on finance professional who enjoys both execution and analysis.
- Someone comfortable working independently while collaborating closely with colleagues.
- Strong judgment, discretion, and a high degree of professionalism.
- A problem-solver who looks for ways to improve processes and add value.

RESPONSIBILITIES

Finance



CBV

Chartered
Business
Valuators
Institute

L'Institut
des experts
en évaluation
d'entreprises

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F 416 977 7066

- Ensure the effectiveness and integrity of financial policies, procedures, controls, and data in accordance with Canadian GAAP for not-for-profit organizations and CBV Institute's By-Laws and policies.
- Lead all financial planning and analysis, including forecasting, budgeting, and cash flow management.
- Responsible for full range of accounting transactions within Quickbooks Cloud, including accounts payables and accounts receivables, producing EFT batches, reconciling invoices against contracts and purchase orders, and ensuring outstanding receivables are collected.
- Reconcile and record deposit reports and bank reconciliations throughout the year.
- Prepare monthly, quarterly and year-end financial statements and related reports in accordance with Canadian GAAP.
- Ensure all tax (including sales tax) filings are complete and up to date.
- Prepare for, manage, facilitate and support auditors with the preparation of annual tax returns and audited financial statements.
- Manages cash balances to maximize amounts available for investment purposes.
- Initiate term deposit investments and withdrawals as appropriate, on approval of the Secretary/Treasurer.

Data & Systems Analytics

- Manage and support the ongoing optimization of the organization's Association Management System (AMS) and related financial and reporting systems.
- Extract, analyze, and interpret data from the AMS and accounting systems to support management decision-making across key association activities, including:
 - Membership growth, retention, and engagement
 - Education programs, credentialing pathways, and learner progression
 - Events, conferences, and professional development offerings
 - Program and revenue performance
- Prepare regular and ad hoc reports, dashboards, and analyses that clearly communicate trends, variances, and performance drivers to internal stakeholders.
- Work proactively with colleagues to anticipate upcoming data and reporting needs, ensuring that relevant data is captured, structured, and accessible.
- Identify trends, patterns, and emerging issues in financial and operational data, and flag risks and opportunities in a timely and practical manner.
- Act as a key point of contact between finance, operations, and technology for data-related questions and initiatives.

Corporate Support and Strategic Leadership

- Provide financial management and operational advice, support, and recommendations to the CEO.
- Act as the lead staff contact for the Audit and Finance Committee, and present financial reports and insights to the President & CEO, the Audit and Finance Committee, and the Board of Directors.
- Provide financial and analytical support for internal projects and initiatives.
- Collaborate cross-functionally to support organizational priorities.
- Contribute to the development, monitoring, and refinement of internal policies, procedures, and controls to support effective operations and risk management.
- Other duties as necessary.

QUALIFICATIONS AND SKILLS

Education and Experience:

- CPA designation is required.
- 5+ years of progressive experience in accounting or finance, including hands-on responsibility for full-cycle accounting.
- Thorough knowledge Canadian accounting standards for not-for-profit organizations.
- Experience with financial analysis, reporting, and data interpretation.
- A successful progressive track record with a demonstrated ability to direct and administer a diverse range of administrative functions.
- Experience providing executive level support.

Skills and Competencies

- Exceptional verbal and written communication skills (bilingual is an asset).
- Strong attention to detail with a big-picture mindset, organizational skills, and ability to manage multiple priorities while producing quality work.
- Ability to think and act strategically, identify key and emerging issues, develop effective response options.
- Proven ability to work effectively independently and as part of a team.
- Advanced computer skills and experience with software including Microsoft Word, Excel, Outlook, PowerPoint, Adobe Acrobat, Quickbooks (Cloud).
- A commitment to working cooperatively in a team environment with senior staff, board of directors, volunteers and stakeholders.
- Experience with not-for-profit organizations is an asset.

WHAT WE OFFER

- Competitive pay with an annual bonus.
- Opportunity for career growth.
- Flexible working solutions - this role is currently hybrid with 2-3 days in CBV Institute's office. The general hours of work will be 9am-5pm, with overtime and travel required on occasion.
- Extended health, vision, and dental benefits package, and other staff wellness benefits.
- Long-term disability and life insurance.
- Employer-sponsored RRSP.
- Payment of annual dues for professional designations.
- Paid time off during the Christmas holiday season and summer hours.
- Ongoing support for learning and training related to the job and career development.