

Chief Financial Officer (CFO)

Edison and Ford Winter Estates – Fort Myers, Florida

Organization Overview

Make a meaningful impact at the Edison and Ford Winter Estates—one of the most visited historic home sites in the United States and a cornerstone of cultural heritage in Southwest Florida. Listed on the National Register of Historic Places and open to the public since 1947, the Estates span over 20 acres of historic buildings, gardens, and research spaces, including the winter homes of Thomas Edison and Henry Ford, a botanical laboratory, and a 15,000-square-foot museum.

Position Summary

The Chief Financial Officer (CFO) is a senior-level, hands-on executive leader reporting directly to the President & CEO. This role is responsible for the strategic and operational oversight of the organization's financial and administrative functions.

The CFO plays a critical role in ensuring fiscal integrity, operational efficiency, and long-term financial sustainability for an organization with:

- \$6.5 million annual operating budget (earned revenue)
- \$1 million in annual capital projects
- 87 staff members

This position oversees accounting, financial reporting, budgeting, retail operations, insurance, and compliance, while serving as a key advisor to executive leadership, the Finance Committee, and the Board of Trustees.

Key Responsibilities

Financial Leadership & Strategy

- Lead all financial planning, forecasting, and analysis to support strategic decision-making
- Prepare daily financial tracking reports and monthly financial statements
- Develop and manage annual operating and capital budgets in collaboration with the CEO and department heads
- Provide financial projections and scenario planning for strategic initiatives
- Establish and maintain strong financial controls, systems, and procedures

Accounting & Reporting

- Oversee all accounting functions including payroll, tax reporting, fixed asset records and general ledger
- Manage month-end and year-end close processes
- Ensure accurate fiscal recordkeeping and regulatory compliance
- Supervise preparation and filing of IRS Form 990, state filings, and other required reports
- Submit quarterly financial reports in accordance with City lease requirements

Revenue & Operational Oversight

- Oversee revenue-generating operations, including admissions, ticketing, and museum retail
- Monitor point-of-sale systems, daily deposits, and revenue reconciliation processes
- Develop and maintain a clear cash receipts flow and reporting structure
- Analyze revenue trends and identify opportunities for growth and efficiency

Audit, Compliance & Risk Management

- Lead the annual independent audit process and ongoing internal audits
- Ensure compliance with all financial regulations and nonprofit solicitation registration
- Manage organizational insurance programs (liability, property, D&O, etc.)
- Oversee grant budgeting, tracking, and reporting

Administration & HR Coordination

- Oversee payroll review and approval processes including possible cost of living increases
- Work with Human Resources and CEO to obtain the best possible annual renewals of benefit plan offerings
- Administer employee benefits (health, workers' compensation, etc.) through service providers
- Maintain accurate HR-related records on-site, and ensure compliance with all records retention policies

- Review procurement card and petty cash activity
- Act as 401k sponsor for retirement plan.
- Provide strategic direction for IT support providers and administrative departments to deep day-to-day operations running efficiently and ensuring infrastructure supports business objectives efficiently, managing cybersecurity risks, and optimizing technology investments.

Governance & Leadership

- Present financial reports and analysis to the Finance Committee and Board of Trustees
- Partner closely with the CEO on operational and administrative strategy
- Participate in executive planning sessions and organizational initiatives
- Ensure adherence to corporate policies and procedures
- Collaborate with external partners, including vendors, auditors, investment advisors, and the City

Supervisory Responsibilities

- Directly supervises accounting staff and the Museum Store Manager
- Provides leadership, mentorship, and performance oversight to assigned team members

Qualifications**Required**

- Bachelor's degree in business, Finance, Economics, or related field
- Minimum of 5 years of senior-level financial management experience
- Demonstrated experience in nonprofit, institutional, or retail financial operations
- Strong leadership skills with the ability to function both strategically and hands-on
- Experience working with boards, committees, and executive leadership
- Experience with QuickBooks

Preferred

- Advanced degree (MBA, CPA, or equivalent)
- Experience in a museum, cultural institution, or historic site setting

Work Schedule

- Full-time position with benefits
- Standard schedule: five days per week
- Organization operates 7 days a week, with extended hours during special events and holidays. Availability required for evenings, weekends, and holidays as needed

Physical Demands & Work Environment

- Frequent walking across a large, multi-building historic campus
- Occasional standing, lifting (up to 20 pounds), bending, and climbing

Compensation

- Salary range: \$110,000 – \$120,000, commensurate with experience and qualifications.
- Comprehensive benefits package includes health insurance, vision, dental, life insurance, employee assistance program, flexible spending account, health savings account, paid time off, retirement plan with employer match, and the opportunity to work at one of Southwest Florida's premier cultural institutions.

To Apply

Please submit a resume and cover letter to **Sherri Muske, HR Manager** at smuske@edisonford.org.