

Welcome To

Laguna Woods Village®



We are now accepting
applications for the role of

ASSISTANT DIRECTOR OF FINANCIAL SERVICES

Recruiting services provided by Bob Hall & Associates



Village Management Services, Inc.

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Bob Hall & Associates



THE COMMUNITY

Laguna Woods Village first opened its gates in an unincorporated area of Orange County on September 10, 1964. Within six months, nearly 900 families had moved into what was soon to become the largest gated, age restricted community in the country. Today, more than 18,600 people reside in the Village. The City of Laguna Woods was incorporated on March 24, 1999, and 90% of its population is comprised of Laguna Woods Village residents.

Laguna Woods Village is an age-restricted community as defined under California Civil Code 51.3. At least one occupant must be 55 years of age or older, and all other persons who reside in the community must be at least 45 years of age, unless the other occupant is a spouse, a registered domestic partner or a primary provider of physical health care. Retirement is not a requisite for residency, as many residents continue to maintain active careers. Any person wishing to reside in the community must obtain prior approval from the board of directors.

GOVERNANCE

Community governance is organized under California non-profit mutual benefit corporation law. There are four corporations, three of which are mutual housing corporations; the fourth is the Golden Rain Foundation of Laguna Woods (GRF). The mutuals are responsible for services directly related to housing and common areas; GRF is responsible for all shared community amenities, including the bus system, security, clubhouses, performing arts center, swimming pools, golf courses, equestrian center and other recreational facilities.

The assistant director of Financial Services is employed by Village Management Services Inc. (VMS), a California nonprofit mutual benefit corporation and the managing agent for Laguna Woods Village. VMS, in cooperation with the boards of directors of the community's housing mutuals and GRF, employs more than 700 full-time and part-time personnel to provide necessary services. Ownership rights include a voting membership to the mutual and a nonvoting membership to GRF. Each mutual corporation has its own set of governing documents and a board of directors elected by its members. Board representatives are members of the community and serve on a volunteer basis. The GRF board of directors is comprised of members of each of the three housing mutual corporations. Corporate members elect the GRF board, which consists of members of each of the three mutual boards of directors.



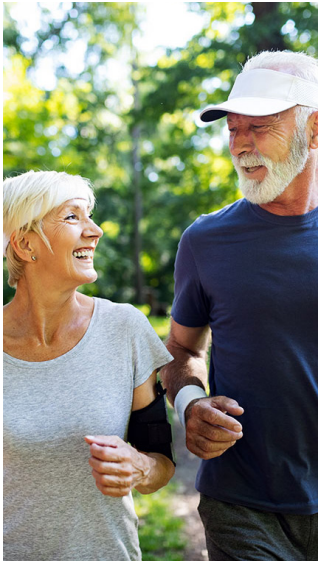
THE POSITION

Under minimal direction, the assistant director of Financial Services oversees the development of corporate financial plans, conducts systems and special analyses, manages Accounts Payable Division and Warehouse personnel, and performs related work as required. Work involves regular contact with all departments, divisions, committees, board members and residents. Supervision is exercised over various hourly and salaried department employees.

ESSENTIAL FUNCTIONS

- Confers with the director of Financial Services over planning, organizing and implementing the budget and financial planning processes. Directs development and maintenance of annual budgets and long-range organization reserve studies for all mutual corporations. Directs preparation and distribution of plan materials and instructions to all divisions, and analyzes financial data and assists in compiling budget requests.
- Monitors and reports monthly on the maintenance expenditure programs, cost collection system and payroll and direct/indirect hours, as well as the financial statements of income/expense, operating statements and supplemental schedules.
- Assists managers with reconciling each system and recommends appropriate action as needed. Responsible for maintaining job numbers and work codes for use in the inventory and cost collection systems, identifies discrepancies and initiates corrective action if necessary.
- Coordinates the capital planning process, including review of subject reports and preparation of reports when required.
- Assists in conducting financial studies and special analyses, including, but not limited to, cost controls, operating and budget procedures.
- Plans, organizes, and manages the warehouse, central printing and mail service to ensure efficient storage and flow of materials, and maintain safe, secure, and professional handling practices. Also responsible for approving the transfer/sale/disposal of all obsolete equipment, which includes approval of the selling price and/or controlling the bidding process.
- Develops and reports on key performance indicators to provide progress updates on milestones and insights that help people across the organization make better decisions.





IDEAL CANDIDATE

The ideal candidate for this position possesses strong technical skills, leadership and strategic thinking abilities. They should demonstrate expertise in financial reporting, budgeting, forecasting, and financial planning, while also showcasing the ability to lead and inspire a finance team and collaborate with other departments. They should be adept at communicating complex financial information clearly and concisely to both

technical and non-technical audiences. The ideal candidate subscribes to the philosophy of continuous improvement, has tremendous initiative and demonstrates the highest-level character and ethical standards.

BENEFITS

The salary range for this opportunity is **\$140,000 to \$160,000**, DOQ.

VMS offers the following benefits:

Workweek: VMS provides resident services Monday through Friday, 8 a.m. to 5 p.m. Mindful of maintaining an organizational culture that values work/life balance, VMS provides flexibility in the work schedule and remote working opportunities.

Leaves: 10 observed paid holidays (80 hours) plus vacation leave accrued based on length of service. Sick leave begins to accrue upon employment.

Medical/Dental/Vision: VMS provides medical, dental and vision insurance premiums. VMS contracts with Aetna to provide PPO and HMO medical, DPPO and DHMO dental, and vision plans with FSA/HSA options.

Life Insurance/AD&D: VMS provides life insurance and AD&D premiums with supplemental life insurance available.

Long-Term Disability: VMS provides long-term disability premiums.

401(k) Plan: VMS matches biweekly contribution into a 401(k) deferred compensation account up to 5%.

Voluntary Benefits: Voluntary benefits include Aflac, pet, identity theft, and legal services insurance.

Tuition Reimbursement Available.



QUALIFICATIONS

Any combination of education and/or experience that has provided the knowledge, skills, and abilities necessary for acceptable job performance, such as a bachelor's degree from an accredited college or university preferably in accounting, finance, public or business administration, or a related field.

A master's degree in finance, accounting, public or business administration, or a related field along with a CPA registration in the State of California is preferred.



APPLICATION PROCESS

CLOSING DATE | August 15, 2025

To apply for this exciting career opportunity, please send a compelling cover letter and your detailed resume electronically to: apply@bobhallandassociates.com.

Should you have any questions regarding this position or the recruitment process, please contact **Sherry Johnson** at **(714) 273-4187**.

Application materials will be screened in relation to the criteria described in this brochure. Candidates deemed to be the most highly qualified will be invited to participate in the selection process. The selection process will include phone interviews with the most qualified candidates, panel interviews, and final interviews with the CEO/general manager and director of Financial Services. Appointment is subject to completion of thorough background and reference checks, and a pre-employment medical exam.

APPLY TODAY AND BE A PART OF AN AMAZING TEAM!