Fractional Accountant Position Announcement

September 29, 2026

To apply, please click **HERE**.

Compensation: $10,000 - $14,400 annually

Applications will be reviewed on a rolling basis and requested by October 27, 2026, or until the position is filled.

The Opportunity

The A.E. Finley Foundation seeks an experienced accounting professional to provide comprehensive financial and administrative support on a contract basis. Reporting to the President of the Board of Directors, this position will play an important role in maintaining the organization's financial health and ensuring sound, accurate, and timely financial operations. Responsibilities include maintaining accurate financial records, managing recurring accounting activities, preparing financial reports and materials for the Board, supporting annual audits and tax filings, and ensuring the organization's financial obligations are completed accurately and on schedule. The ideal candidate will bring strong accounting expertise, attention to detail, sound judgment, and the ability to work independently while providing reliable financial guidance and support to organizational leadership. CPA is highly preferred.

The Organization

Founded in 1957 by A.E. Finley and his wife, Marian Nottingham Finley, the A.E. Finley Foundation is a tax-exempt private foundation dedicated to carrying forward the legacy of generosity that defined its founder. Its mission is twofold: to give individuals the opportunity to recognize their self-worth and pursue their life goals, and to provide relief, comfort, and support to those in need.

A.E. Finley began his career in Raleigh in 1926 as a salesman for a heavy equipment company. Three years later, he and his business partners founded Raleigh Tractor and Truck Company, and by 1931 he had launched his own firm, North Carolina Equipment Company. Within a decade, his network of heavy equipment companies spanned five southeastern states and had grown into the largest equipment distributorship in the United States. That network in turn gave rise to many other companies across a wide range of industries.

Through the Foundation, Mr. Finley's generosity lives on. Today it supports countless organizations that make a lasting difference in the lives of people throughout the community.

For more information, visit aefinleyfoundation.org

Core Responsibilities

The Fractional Accountant will work with the President of the Board of Directors on a contract basis to provide comprehensive administrative support with a focus on:

Accounting and Administrative:

Ongoing / Weekly:

- Retrieve and sort incoming mail from the organization's PO Box in Raleigh, routing items to the appropriate person or department.
- Process deposits for checks received through the organization's P.O. Box, ensuring timely and accurate recording of funds received.
- Maintain organized financial and administrative files and oversee document retention in accordance with established policies and applicable requirements.
- Provide ongoing accounting and administrative support for two existing charitable remainder trusts, including maintaining accurate records and supporting required financial activity.
- Calculate and establish federal excise tax estimates through the Electronic Federal Tax Payment System (EFTPS), ensuring timely payment and accurate tax records.

Monthly:

- Oversee the timely and accurate processing of vendor invoices and preparation of payments, ensuring compliance with established financial policies and internal controls.
- Lead the monthly reconciliation of the operating checking account, investigate and resolve discrepancies, and prepare the bank reconciliation and supporting documentation for review and approval by the designated Board member.
- Review and download month-end investment statements and maintain accurate investment records and supporting documentation.
- Prepare and post journal entries to record monthly investment activity, adjust investment holdings to current market value, and ensure transactions are accurately reflected in the general ledger.
- Calculate, review, and record monthly depreciation for fixed assets in accordance with applicable accounting practices.
- Manage the month-end close process, including preparation and posting of necessary adjusting and closing entries, review of account balances, and resolution of discrepancies to ensure the general ledger is accurate, complete, and ready for financial reporting.

Quarterly:

- Update investment reporting templates with current market values and the most recent performance returns and provide the completed materials to the ClearView team for analysis.
- Upon completion of the ClearView peer analysis, access the ClearView portal to retrieve and save the Summary Returns Peer Analysis report as a PDF.
- Distribute the report to the Board of Directors along with a concise summary of the quarterly financial statements and relevant investment performance.

Annually:

- Prepare and file required Forms 1099-NEC for applicable non-employee compensation, ensuring accurate reporting and timely compliance with federal requirements.
- Organize and file the Wake County Business Personal Property Tax Listing, ensuring all required information is accurate and submitted by the applicable deadline.
- Coordinate preparation for the annual financial statement audit by compiling required schedules, financial records, supporting documentation, and other requested materials, and upload materials to the audit portal.
- Plan and finalize the annual estimate for charitable distributions; provide discretionary distribution spreadsheets to Board members for review; and coordinate preparation and issuance of checks for approved charitable distributions.
- Collect, scan, organize, and maintain acknowledgment letters from charitable distribution recipients, ensuring complete documentation and appropriate financial records.

Board Meetings and Financial Reporting;

- Collaborate with the Board President to develop meeting agendas and ensure financial matters and other key business items are appropriately incorporated.
- Maintain and update the excise tax and charitable distribution analysis to estimate the current year's excise tax liability and required charitable distribution amount.
- Prepare a comprehensive year-to-date financial statement package through the most recently closed quarter-end, including comparative balance sheets, income statements, footnotes, operating cash flow budget, private equity schedule, and estimated contributions and excise tax schedules.
- Coordinate and distribute the Board meeting materials, including the agenda, financial statement package, ClearView report, and draft minutes from the prior meeting, during the week preceding each meeting.
- Attend Board meetings to present and discuss the financial statement package, respond to questions as appropriate, and document meeting minutes and action items.

Required Attributes, Skills, and Qualifications

The Fractional Accountant must share an understanding and passion for the mission of the A.E. Finley Foundation and will help foster a collaborative and meaningful relationship with the Board. In addition, they should possess a variety of attributes, including the following:

Qualifications

- Seven to ten years of progressive accounting experience, with demonstrated responsibility for financial reporting, reconciliations, and month-end and year-end close processes.
- CPA highly preferred.
- Nonprofit accounting experience is strongly preferred, with familiarity with the financial and reporting requirements of nonprofit organizations.
- Advanced proficiency with QuickBooks Online and strong knowledge of financial reporting, account reconciliation, general ledger management, and Generally Accepted Accounting Principles (GAAP).
- Exceptional organizational skills and attention to detail, with the ability to manage multiple priorities, meet deadlines, and maintain accurate financial records.
- Demonstrated ability to work independently and exercise sound professional judgment while communicating effectively with Board members, auditors, investment advisors, and other professional partners.
- Proven ability to handle confidential financial and organizational information with discretion, integrity, and professionalism.

Work Environment and Compensation

- Approximately 100 to 120 hours annually, with additional hours anticipated during the first year to support training and knowledge transfer from the departing CPA.
- Primarily remote, with in-person attendance required for Board meetings and other key meetings with the organization's accounting firm, as needed.
- Hourly rate is expected to be $100-$120 per hour, commensurate with experience, qualifications, and demonstrated expertise.
- This is a 1099/contract role.

To Apply: Please submit a cover letter and resume to **HERE**. Applications will be accepted until the position is filled. The expected start date is late 2026.

The A.E. Finley Foundation
P.O. Box 98266
Raleigh, NC 27624