



Twin Lakes
COMMUNITY

Chief Financial Officer

Leadership Profile

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WittKieffer

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The Opportunity

Twin Lakes Community offers an exceptional opportunity for a compassionate, mission-driven financial executive to serve as Chief Financial Officer at one of North Carolina's most respected and financially strong Continuing Care Retirement Communities. This is a high-impact leadership role for a CFO who is energized by stewardship, strategy, and service, and who is committed to ensuring long-term financial strength in support of a vibrant, resident-centered community.

Nationally recognized for excellence, Twin Lakes was ranked #20 among the nation's top CCRCs by *Newsweek* for 2025 and again earned Top 20 recognition for 2026, along with a #3 ranking among CCRCs in North Carolina. Its commitment to high-quality care is further reflected in its nursing program's #6 ranking among the best nursing homes (100–149 beds) in North Carolina for 2026. Additionally, in 2025, Twin Lakes was named 19th on *The Nation's 200 Largest Not-for-Profit Single-Campus Senior Living Organizations* by the LeadingAge Ziegler 200.

The CFO will join a stable, well-governed organization with a long history of thoughtful growth, strong reserves, and national recognition for quality and financial performance. With a strong BBB Fitch financial rating, CARF accreditation, and consistent five-star CMS ratings in skilled nursing, Twin Lakes provides an environment where financial discipline and mission alignment are deeply ingrained. The CFO will steward a complex financial enterprise that includes multi-level care operations, real estate, investments, endowment and trust assets, bond financing, and long-range capital planning.

Reporting to the President/CEO and serving as a trusted partner to the Board of Directors, the CFO will play a central role in shaping Twin Lakes' strategic direction. Success in this role requires a sharp, thoughtful leader who brings intellectual curiosity, a willingness to learn, and the confidence to articulate well-reasoned points of view. Twin Lakes seeks a CFO who can challenge assumptions constructively, back recommendations with sound analysis, and engage in respectful, productive dialogue at the highest levels of the organization.

Equally important, the CFO must be a compassionate, servant-hearted leader who understands the human impact of financial decisions. This individual will be comfortable and effective communicating with people from a wide range of backgrounds and perspectives, including residents, frontline staff, senior leaders, Board members, and external partners, translating complex financial matters into clear, accessible insights. The ability to build trust, listen deeply, and lead with empathy is essential in a community centered on dignity, care, and connection.

The role also offers the opportunity to lead, mentor, and strengthen a talented finance and business office team within a mission-focused culture. The CFO will bring a strategic mindset paired with operational pragmatism, balancing financial rigor with flexibility and long-term planning with day-to-day realities.

The successful candidate will bring a strong track record of financial leadership, exceptional interpersonal skills, and a genuine commitment to improving the lives of seniors; a bachelor's degree and a CPA license are required for the role. For the right executive, this position represents more than a leadership role; it is an opportunity to steward a meaningful legacy, contribute to a community that values purpose and people, and help guide Twin Lakes confidently into its next chapter of service, sustainability, and thoughtful growth.

Organization Overview

About Twin Lakes Community

Twin Lakes Community (Twin Lakes) was established in 1983 as the enduring legacy of Wade G. and Agnes Coble, whose vision and generosity laid the foundation for a mission that continues to thrive more than four decades later. Members of Macedonia Evangelical Lutheran Church, the Cobles left a \$3.5 million bequest to the church to establish health services for older adults in Alamance County. In response, the church formed Lutheran Retirement Ministries of Alamance County, North Carolina, launching what would become Twin Lakes Community.

Twin Lakes first opened its doors in March 1983 with Coble Creek Healthcare, three apartment buildings, and ten cottages. Since that time, the community has grown thoughtfully and substantially, evolving into one of North Carolina's largest and longest-established nonprofit Continuing Care Retirement Communities (CCRCs), as designated by the North Carolina Department of Insurance. Today, Twin Lakes serves approximately 850 residents, including more than 650 individuals in independent living, and is supported by a dedicated team of over 450 employees. Over the years, Twin Lakes has served thousands of residents and family members from across the United States.

Twin Lakes offers a full continuum of care on a single, integrated campus, including Independent Living, Assisted Living, Memory Care, and Skilled Nursing. The community's comprehensive approach also includes an on-site primary care clinic, therapy services, EMT responders, home care, and adult day services, ensuring residents receive coordinated, person-centered care that promotes independence, wellness, and peace of mind.

At its core, Twin Lakes is a community shaped by people from many walks of life who choose to live with purpose, surrounded by others who are engaged, curious, and committed to living lives that matter. The culture emphasizes connection, dignity, and meaningful engagement, creating an environment where residents are known, valued, and supported.

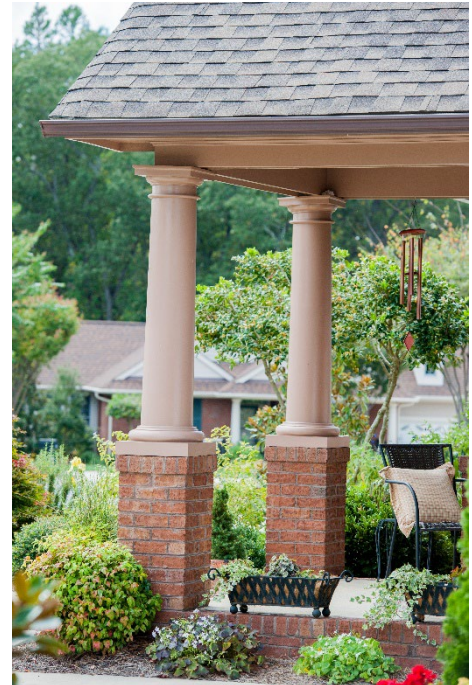
Guided by a mission born of service and stewardship, Twin Lakes continues to build upon its strong foundation while thoughtfully preparing for the future. Every role across the organization contributes to sustaining a vibrant, compassionate community, making Twin Lakes not only a trusted provider of senior services but a place where legacy, excellence, and belonging come together.

Mission & Core Values

Christ-Centered. Love, compassion, care, stewardship, and service are at the heart of all we do.

Financially Stable. To honor our commitments to all members of our community, we must be good stewards of the resources provided to us.

People First. We provide innovative opportunities for personal fulfillment, dignity, and well-being for all members of our community.



Quality. We are committed to enriching lives by providing superior services with integrity.

Inclusive. We celebrate the diversity of our community and welcome people of all faiths, races, cultures, and life experiences.

Continuum of Care

Coble Creek Healthcare & Rehab

Coble Creek brings together an exceptional facility, innovative care programs, and a devoted, specially trained staff to create an unparalleled environment for compassionate senior care. Designed to serve both short-term rehabilitative needs and long-term residency, Coble Creek offers 104 private rooms with private bathrooms, Medicare- and Medicaid-approved skilled nursing care, and a wide range of on-site amenities including dining, salon services, chapel space, inviting common areas, abundant natural light, and outdoor spaces. Comprehensive therapeutic services, including speech, physical, occupational, and aquatic therapy, along with specialized clinical care, support residents' health, comfort, and independence. With a strong focus on community, dignity, and peace of mind, Coble Creek is where excellence and compassion meet to help each resident live life to its fullest potential.

Deacon Pointe Assisted Living

Deacon Pointe at Twin Lakes Community offers a welcoming, residential model of assisted living for individuals who benefit from supportive services provided by licensed staff. Residents are assisted by attentive staff and benefit from a vibrant calendar of life-enrichment activities that support all dimensions of wellness. Deacon Pointe features 36 private apartments.



Moneta Springs Memory Care



Moneta Springs at Twin Lakes Community offers a thoughtfully designed, secure, and engaging setting for individuals living with dementia, combining innovative care programs, specialized therapies, and a calming environment. Designed as a true home, Moneta Springs supports residents in living active, meaningful lives while honoring their individuality, dignity, and daily rhythms. Moneta Springs contains 32 residences.

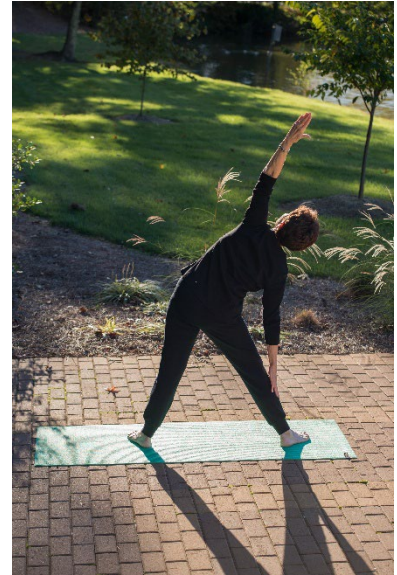
Home Care Services

Twin Lakes Community offers a licensed Home Care Agency serving both residents and individuals throughout the broader community, providing professional, reliable support in a variety of living settings. Care is delivered by certified nursing assistants (CNAs) who have completed a state-approved program that includes extensive classroom instruction, clinical training, and successful completion of state and clinical examinations, ensuring a higher standard of care than agencies that rely on non-certified sitters. These trained professionals assist with personal care needs to support independence and dignity at home, in assisted living, or within nursing facilities. Each home care case is overseen by a registered nurse to ensure services are tailored to individual needs, and no physician's order is required to begin care.

Amenities & Activities

THRIVE Wellness

Twin Lakes Community is committed to a comprehensive approach to wellness, investing in the tools and resources residents need to support successful aging. Through THRIVE, the all-inclusive and specialized wellness program, each participant’s personal goals and individual needs are carefully addressed to create meaningful, life-enhancing results. A dedicated assessment process tracks progress in strength, flexibility, balance, and endurance, consistently demonstrating overall improvement. Residents enjoy access to modern facilities, including a fully equipped exercise room, versatile class spaces, and an indoor aquatics center, ensuring options for all fitness levels, from beginner to advanced. With more than 140 engaging classes offered each month, alongside special adventures such as whitewater rafting, zip-lining, and kayaking, THRIVE promotes an active, enriching, and fun approach to lifelong wellness.



Life Long Learning

At Twin Lakes Community, living, learning, and growing is a way of life. Residents are actively engaged in expanding their knowledge and pursuing personal interests through a robust lifelong learning program that spans the arts, world affairs, history, literature, politics, and the sciences.

A strong affiliation with nationally acclaimed Elon University provides access to a wide range of intellectual, cultural, and entertainment opportunities, including musical performances, theatrical productions, and presentations by world-renowned speakers. Many residents also participate in Elon University’s lifelong learning courses, which offer in-depth exploration of diverse subjects.

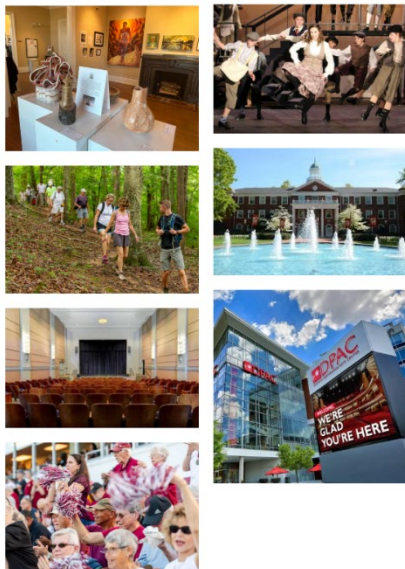
Additional enrichment opportunities include participation in the Guilford College Bryan Series, where residents often hold season tickets to hear distinguished speakers such as heads of state, Nobel Laureates, and winners of Pulitzer, Tony, Grammy, and Emmy awards. On-site programming further enhances the learning experience with offerings such as Friday Series, Saturday Morning Forums, Great Decisions, poetry and literature groups, Shakespeare classes, book clubs, and writing workshops.

A resident-managed library supports these pursuits with a broad collection of books, magazines, and DVDs, fostering a vibrant culture of curiosity and lifelong growth.

Synergy Home

Twin Lakes Community brings the concept of synergy to life through the Synergy Home, a specially renovated villa developed as part of a strategic initiative focused on technology and innovation. Designed through the combined expertise of architects, builders, interior designers, technology innovators, and Twin Lakes staff, the Synergy Home serves as a showcase for cutting-edge design, technology, and tools that support older adults in living independently, safely, and longer.

The home incorporates the latest advances in home automation, smart appliances, adaptable cabinetry, and accessibility features that address vision and hearing loss, mobility challenges, health monitoring, medication management, and overall independence. By staying at the forefront of design and innovation, Twin Lakes provides valuable resources that empower older adults not only to age in place but to thrive in place.



The Synergy Home and its project leader were honored with the Excellence in Innovation Award from LeadingAge North Carolina. This award recognizes programs that enhance mission, improve service, inspire dedication, and demonstrate a willingness to take informed risks in pursuit of expanded possibilities for aging.

Dining

Dining at Twin Lakes Community is centered on choice, flexibility, and quality. Residents enjoy three distinct dining venues to suit a variety of preferences and occasions: The Hearth Café, a cafeteria-style, à la carte option, and two lakefront, full-service venues, The Blue Heron Pub and The Terrace Restaurant. Each venue offers a wide selection of flavorful menu items, with special dietary needs accommodated upon request.

A standout feature of dining at Twin Lakes is the absence of a mandatory meal plan, setting the community apart from many continuing care retirement communities. Residents may choose to dine on campus daily, occasionally, or not at all. Added conveniences include complimentary take-out and home delivery services, as well as full catering options for special events held in community spaces or private residences.

Life-Wise™

Life-Wise™ is a Twin Lakes Community senior advocacy program created to support individuals and families exploring continuing care retirement community (CCRC) options, while also providing ongoing education for residents. The program serves as a single point of access to the knowledge, guidance, and resources offered by Twin Lakes staff, helping to simplify what can often feel like a complex decision-making process.

Through Life-Wise™, knowledgeable sales and admissions team members share clear, objective information about retirement living services, CCRC models, and alternative options. The program emphasizes transparency, enabling prospective residents and their families to compare choices and make informed decisions that best align with their needs and preferences. Life-Wise™ also extends to residents in assisted living, memory care, and nursing care, where admissions and care teams partner with residents and families to navigate insurance benefits, payment options, dietary needs, care and therapy planning, discharge planning, and quality-of-life considerations, providing reassurance, advocacy, and support every step of the way.

Community Outreach

Twin Lakes Community's mission to empower individuals to live, work, and serve to their fullest potential extends well beyond its campus through meaningful engagement and investment in the wider community. Each year, Twin Lakes provides more than \$2 million in charitable care and community benefit through resident support, financial contributions, and volunteer service to organizations whose missions align with shared values and priorities. Support has included partnerships with organizations such as Alamance Community College, Alamance County Meals on Wheels, the Burlington Housing Authority, Elon University, Habitat for Humanity of Alamance County, Lutheran Services in America, the Town of Elon Fire Department, and the Salvation Army of Alamance County. In addition, Twin Lakes actively seeks funding and sponsorship partnerships with qualifying organizations whose programs and initiatives advance the health and well-being of older adults throughout greater Alamance County, North Carolina.

For more information, visit: [Senior Living & Retirement Community in Burlington, NC | Twin Lakes Community](#)

Position Summary

The Chief Financial Officer (CFO) is the senior executive responsible for overseeing Twin Lakes' financial and accounting operations. The role requires strategic and operational leadership across key functions, including finance, treasury, banking, accounting, auditing, budgeting, and financial reporting. The CFO will successfully engage with Twin Lakes Community's leadership, staff, and the Board of Directors, including the Executive, Finance, and Audit Committees. Transparent communication and effective collaboration are key priorities for the new leader.

Reporting Relationships

Direct reports to the CFO include: Business Office staff, including an accountant, accounts payable specialist, payroll specialist, two billing specialists, and purchasing specialist. The combined tenure of the team members is 64 years. They are experienced, dedicated, and effective in their roles. They work together superbly as a team.

Responsibilities

The successful candidate will:

- Provide overall stewardship of Twin Lakes' financial assets and obligations, including financial accounts, real and personal property, deeds and title papers, contracts, trust and endowment funds, legacies, revenues, and liabilities with rigor and care.
- Serve as the trusted steward of all organizational funds, guiding the secure receipt, safeguarding, disbursement, and transparent reporting of resources from operations, investments, gifts, and bequests, supported by strong governance, policies, and internal controls.
- Prioritize exceptional delivery of finance and business services by collaborating across departments, leading Business Office operations, including billing, collections, payroll, and vendor payments, and maintaining a culture of responsive, service-oriented support.
- Lead all treasury and investment activities, directing cash management, liquidity planning, capital structure, debt and bond compliance, rating-agency relationships, and disciplined investment decision-making in partnership with the Finance Committee and CEO.
- Act as a key advisor to the Executive and Finance Committees of the Board of Directors, providing thoughtful portfolio oversight, clear performance reporting, policy adherence, and assurance of compliance with reserve and entrance fee refund requirements.
- Drive comprehensive financial planning and performance excellence, integrating financial statements, operating and capital budgets, fee structures, pro formas, cash-flow analysis, and multi-year forecasts to support strategic and capital priorities.
- Deliver clear, insightful, and timely financial reporting to the Board of Directors and its Executive, Finance, Audit, and Investment Committees, translating complex data into actionable insights across operations, cash flow, endowments, capital investments, and key performance indicators.
- Ensure the highest standards of accuracy, integrity, and compliance with GAAP and all applicable regulatory requirements.
- Operate as the organization's principal financial ambassador, leading relationships with auditors, legal counsel, bankers, investment advisors, bond counsel, insurance brokers, and other partners, and representing Twin Lakes in professional, community, and public settings.

- Responsible for external audit, regulatory, and compliance activities, including coordination with independent auditors and oversight of all required filings and reports (e.g., Form 990, Medicare and Medicaid cost reports, 5500 filings, tax filings, bond disclosures, accreditation, and rating agency submissions).
- Champion enterprise risk management and insurance strategy by managing organizational risk and insurance programs (property, liability, and employee-related coverage), maintaining the enterprise risk management framework, and, as a member of the risk management committee, participate in overseeing comprehensive risk identification, mitigation, coverage oversight, claims management, and risk reporting.
- Recruit, develop, and inspire a high-performing finance and accounting team in partnership with Human Resources, cultivating accountability, ethical leadership, and continuous improvement.
- Engage thoughtfully with prospective and current residents through financial reviews and conversations, supporting transparency, trust, and confidence in Twin Lakes' financial stewardship.

Goals and Objectives

The Twin Lakes Community CFO must demonstrate meaningful progress within the first 18 to 24 months of their tenure in the following key areas. These key areas are not listed in order of priority.

Leadership and Culture

- Serve as a highly visible and trusted leader within Twin Lakes Community, recognized as a strategic advisor for finance, accounting, and treasury. Build strong, collaborative relationships with resident leadership, residents, colleagues, and external partners through approachability, credibility, and transparency.
- Be regarded as an accomplished financial leader who listens thoughtfully, develops others, and actively coaches and mentors staff.
- Foster a culture of collaboration, continuous learning, and professional growth within finance, accounting, risk, and technology. Partner with the Human Resources Officer to ensure the team has the skills, tools, and development opportunities needed to achieve best-in-class performance.

Strategy and Vision

- Design and execute financial strategies that directly support Twin Lakes Community's growth and long-term sustainability in alignment with the organization's mission, vision, and values.
- Provide rigorous financial modeling and pro forma analysis; evaluate new programs, initiatives, and strategic opportunities.
- Proactively assess capital needs and develop forward-looking plans that preserve financial strength and flexibility over the short and long term.

Financial Operations and Support

- Support strong and disciplined leadership across finance, accounting, treasury, technology, and risk management functions, ensuring excellence in financial reporting, budgeting, forecasting, investment oversight, bond compliance, and financial planning.
- Oversee monthly and annual financial close and review processes, ensuring accuracy, timeliness, and clear communication of results.
- Steer operating and capital budget development, performance monitoring, variance analysis, and contract reviews to support informed decision-making.
- Sustain productive relationships with bondholders and ensure ongoing compliance with bond covenants and related requirements.
- Balance sound financial stewardship with the delivery of high-quality services and optimal efficiency.
- In partnership with Information Technology, enhance financial systems, data integrity, and management reporting capabilities.

Board and External Leadership

- Actively participate in Board of Directors and Executive, Finance, and Audit, Committee meetings, and provide clear, accessible financial updates to resident leadership as appropriate.

- Functions as Twin Lakes Community's primary liaison with auditors, investment bankers, bond counsel, investment advisors, and insurance brokers.
- Maintain visibility with advocacy organizations, regulators, governmental leaders, industry peers, and partners, while supporting philanthropic efforts and the pursuit of alternative funding sources.

Candidate Qualifications

Education/Certification

- A bachelor's degree in business, accounting, finance, or a related field is required.
- A licensed CPA is required.
- An MBA or a master's degree in accounting is strongly preferred.

Knowledge and Work Experience

- At least ten years of technical experience in financial administration with previous supervisory experience required. Financial administration experience in aging services, including Life Plan or Continuing Care Retirement Community settings, is preferred, but not required.
- Exceptional verbal and written communication abilities, with a strong aptitude for effective negotiation.
- Proven expertise in project and time management, coupled with a commitment to fiscal responsibility.
- Strong decision-making and organizational skills, with the capacity to foster positive relationships with residents and staff.
- Detail-oriented and highly adaptable, able to prioritize and manage multiple complex projects simultaneously.
- Advanced knowledge of financial planning and analysis, including long-term financial modeling.
- Knowledge of regulatory requirements, accreditation standards, and compliance specific to long-term care facilities.
- Competence in financial systems, ERP platforms, and data analytics tools.
- Management of budget development, cost containment strategies, and financial benchmarking.
- Integration of finance with strategic planning, master planning, and growth initiatives.

Leadership Skills and Competencies

- Flexibility and Innovation – Embraces change with agility by introducing fresh ideas, exploring creative solutions, experimenting with new approaches, and adapting seamlessly to evolving circumstances.
- Communication and Collaboration – Builds strong relationships by recognizing individual contributions and fostering open dialogue, mutual understanding, and collaborative problem-solving.
- Drive for Achievement – Demonstrates initiative and determination to pursue both personal and organizational goals, capitalizing on opportunities and continuously learning from experience.
- Resident, Customer, and Service Orientation – Delivers responsive, high-quality service by actively supporting and engaging with residents, colleagues, and external stakeholders.
- Strategic Vision – Drives long-term financial strategies aligned with mission, vision, and regulatory environment. Anticipates industry trends and positions the organization for sustainable growth.

- Financial Acumen- Familiarity with the operational and regulatory components of accounting, finance, budgeting, and compliance.

The Community

Elon and Burlington, North Carolina

Twin Lakes is located in the Town of Elon, adjacent to the City of Burlington, in North Carolina. Elon and Burlington are welcoming communities in the heart of Alamance County, offering a distinctive blend of small-town Southern charm and easy access to some of the state's most dynamic metropolitan regions. Rooted in a rich textile history, this region combines historic neighborhoods, revitalized downtown spaces, and modern amenities with outdoor recreation along the Haw River, creating an inviting, balanced setting that is both grounded and forward-looking.

The area offers an appealing quality of life supported by a reasonable cost of living, diverse housing options, and a comfortable pace that allows residents to enjoy life beyond work without sacrificing access or opportunity. Shorter commutes, accessible healthcare, and a strong sense of community make Elon and Burlington attractive to individuals and families alike.

Centrally located along the I-40/I-85 corridor, Elon and Burlington sit between the Raleigh–Durham–Chapel Hill Triangle and the Greensboro–High Point–Winston-Salem Triad. This strategic location provides convenient access to major employment centers, cultural institutions, and world-class medical facilities affiliated with Duke University, the University of North Carolina, and Wake Forest University. Nationally acclaimed Elon University is nearby, contributing a vibrant intellectual and cultural presence to the area through lectures, performances, lifelong learning programs, and arts experiences.

Transportation access further enhances the region's connectivity. Two interstate highways, nearby international airports, and Amtrak service make regional and national travel efficient and accessible. The region's central geography also places residents roughly equidistant between North Carolina's Blue Ridge Mountains and its Atlantic coast, making both outdoor escapes and day trips easily attainable.

Locally, Elon and Burlington offer a wide range of recreational, cultural, and lifestyle amenities. Parks, greenways, sports facilities, and outdoor destinations support active living, while organizations such as the Alamance Arts Council, local theaters, galleries, and community festivals foster creativity and civic engagement. Dining, shopping, and entertainment options continue to grow, blending local favorites with regional and national offerings.

The region delivers an exceptional blend of comfort, connectivity, and culture. Its approachable scale, central location, educational and artistic resources, and access to both nature and metropolitan energy make it an easy place to settle into, and a rewarding place to call home.



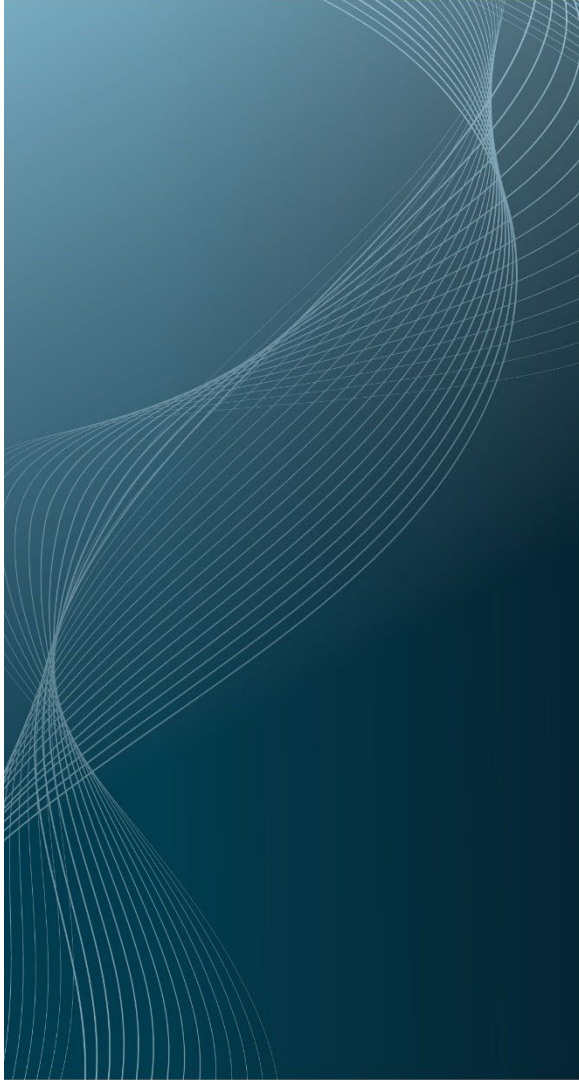
Procedure for Candidacy

Please direct all nominations and resumes to Lisa DeSimone Arthur and Charlotte Harris, preferably via e-mail, to charris@wittkieffer.com.

Twin Lakes Community is an Equal Opportunity Employer committed to administering all employment activities without discrimination and to considering qualified applicants without regard to race, color, religion (including pregnancy and related conditions), sex, sexual orientation, gender identity or expression, national origin, age, disability, genetic information, protected veteran or military status, political affiliation, or any other status protected by applicable federal, state, or local law; we provide reasonable accommodations for religious practices and for individuals with disabilities and foster a collaborative, inclusive environment where diverse perspectives are respected and all individuals feel secure, welcome, and heard.

The material presented in this leadership profile should be relied on for informational purposes only. This material has been copied, compiled, or quoted in part from Twin Lakes Community documents and personal interviews and is believed to be reliable. While every effort has been made to ensure the accuracy of this information, the original source documents and factual situations govern.

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