

Controller

Ancora is seeking an experienced accounting leader to serve as Controller, owning the firm's accounting function across multiple legal entities and business lines. Reporting directly to the Chief Financial Officer, the Controller leads the accounting team, owns the monthly and quarterly close, manages internal controls and audit execution, and serves as a key partner to both firm leadership and Ancora's parent company. This is a hands-on ownership role for a highly organized professional who can keep a complex, multi-vertical organization running with accuracy, control, and discipline — and who can help drive the firm's accounting systems forward through a significant platform transition.

The Opportunity

This is a rare chance to step into a true controllership and own an accounting function end-to-end, with direct visibility to the CFO and firm leadership. It is well-suited to an accounting professional ready to take the next step into broad ownership and to make a visible mark early through a major systems transformation. What makes the role compelling:

- › Ownership and visibility — full ownership of the accounting function, reporting directly to the CFO, with a real seat in how the firm runs and a clear path to grow.
- › A recognized, growth-oriented firm — Ancora is a nationally-known value and activist investment manager, backed by Focus Financial Partners, combining the visibility and momentum of a respected name with the stability and resources of a larger parent.
- › Build, not just maintain — a chance to help lead a firmwide migration to Workday and modernize processes, leaving a lasting imprint rather than simply running steady-state close.

Location

This position is located at Ancora's Cleveland (Mayfield Heights), Ohio, office. No remote option.

Duties & Responsibilities

- › Own the monthly and quarterly close across the firm's multiple legal entities and business lines, including general ledger management, journal entries, accruals, adjustments, and account reconciliations.
- › Lead, develop, and hold accountable the accounting team — including two internal accountants and a dedicated offshore accounting team — setting priorities, reviewing work, and ensuring deadlines are consistently met.
- › Own the firm's internal control environment and coordinate quarterly SOX control reporting and documentation.
- › Partner closely with the broker-dealer subsidiary's Chief Compliance Officer and the outside FINOP on the entity's standalone audit, serving as the accounting lead within that team — compiling and managing audit sample requests, and reviewing the financial statements and footnote language to ensure everything is sound from a GAAP perspective.
- › Coordinate the firm's 401(k) plan audit, preparing schedules and interfacing with auditors in partnership with the CFO.

- › Oversee the quarterly management-fee billing and receivables process, partnering with and reviewing the work of the billing and operations team to ensure accurate, timely invoicing and collections.
- › Serve as a key liaison to Ancora's parent company on applicable tax preparation, cash-flow management, and consolidated financial statement support.
- › Help lead the firm's accounting systems transformation, including the upcoming migration to Workday, and continually identify opportunities to improve efficiency, strengthen controls, and reduce manual work across recurring accounting processes.
- › Deliver accurate, well-organized, and timely financial data across all entities to support CFO and leadership reporting.

Qualifications

- › Bachelor's degree in accounting, finance, or a related field; CPA strongly preferred.
- › 8+ years of progressive accounting experience, with demonstrated ownership of close, reporting, and audit processes.
- › Public accounting experience expected; prior external audit experience is a strong advantage given the role's audit support and GAAP review responsibilities.
- › Direct people-management experience, including the ability to lead and develop a distributed team.
- › Experience in financial services, wealth management, RIA, broker-dealer, or asset management is a plus, though not required; a strong generalist will get up to speed quickly.
- › Demonstrated ability to manage breadth and complexity across multiple legal entities and business lines — success in this role depends as much on organization, process discipline, and follow-through as on technical accounting expertise.
- › Experience with accounting ERP systems (e.g., Acumatica, Workday, NetSuite, or Sage Intacct); ERP implementation or system-conversion experience strongly preferred given the firm's upcoming migration to Workday.
- › Advanced Excel skills required; experience with Power BI or comparable BI/reporting tools a plus.
- › Familiarity with billing, expense, and payables platforms (e.g., SS&C/Advent products, Concur, AvidXchange) a plus.
- › Strong knowledge of GAAP, internal controls, and process documentation.
- › Exceptional verbal and written communication skills, with the ability to collaborate across all levels of the organization.
- › High degree of organization, accuracy, and attention to detail, with the ability to manage multiple priorities and deadlines in a fast-paced environment.
- › Strong work ethic, sound judgment, and the ability to take ownership of recurring processes from start to finish.

Benefits

Ancora offers a competitive salary and excellent benefit package with a culture of teamwork and recognition.

About Ancora

Ancora is a client-focused and growth-oriented investment and financial advisory firm based in Cleveland, Ohio. The Firm is recognized for providing investment advisory, money management, insurance, and retirement plan advisory services to individuals and institutions. Ancora promotes a friendly, family-

oriented work environment and encourages our employees to strive for personal and professional growth with the highest level of integrity.

Ancora is an Equal Opportunity Employer

All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, national origin, protected veteran status, disability, or any other basis protected by applicable law.

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