



CONTROLLER

CLIENT

[Tortoise Capital](#), founded in 2002 and headquartered in Overland Park, Kansas, is a specialized investment manager focused on publicly traded energy investments that fuel the future, generate steady income, and enhance portfolio diversification. With approximately \$9.6 billion in assets under management as of March 31, 2025, Tortoise Capital invests in companies that deliver reliable, affordable, and secure energy, spanning the entire energy value chain. The firm's disciplined, research-driven investment approach is designed to navigate evolving market dynamics while delivering strong risk-adjusted returns for institutional and individual investors.

A blue rectangular graphic with white text. The main title 'Energy Experts: Powering Your Portfolio' is in a large, bold, sans-serif font. Below it, in a smaller font, is the tagline: 'Specializing in publicly traded energy investments that fuel the future, provide steady income, and enhance portfolio diversification.' To the right of the text is a stylized graphic of concentric, wavy lines in a lighter blue color, resembling a fingerprint or a series of ripples.

Energy Experts: Powering Your Portfolio

*Specializing in publicly traded energy investments that fuel the future,
provide steady income, and enhance portfolio diversification.*

Tortoise Capital employs approximately 40 professionals, with most team members based in Overland Park, Kansas. The firm's investment team has worked together for many years, fostering a collaborative culture that emphasizes deep industry expertise, rigorous fundamental research, and a long-term strategic outlook. This cohesive approach extends across all facets of the business,



supporting the firm's commitment to providing innovative investment solutions that meet the needs of a diverse client base.

With a broad suite of active and passive investment vehicles—including mutual funds, closed-end

funds, ETFs, and separately managed accounts—Tortoise Capital continues to serve as a trusted partner for investors seeking exposure to the energy sector.

WHY TORTOISE?

At Tortoise Capital, you'll join a close-knit team that values collaboration, curiosity, and long-term thinking. With nearly \$10 billion under management and a focus on the energy sector, the firm offers meaningful work, the chance to grow alongside experienced professionals, and a culture where your ideas and impact truly matter.

RESPONSIBILITIES

The Controller will serve as a key partner to the CFO in this newly created and highly visible role. This position offers broad scope and significant impact, overseeing day-to-day accounting operations while contributing to high-level financial strategy.

This is a hands-on role well-suited for someone who thrives in a high-growth, fast-paced environment and is eager to help shape a modern, efficient finance function.

The Controller will oversee day-to-day accounting operations, ensuring accurate and timely recording of financial transactions. The Controller will also manage the annual financial statement audit and collaborate closely with operations to enhance revenue recognition, tracking, and performance analysis. A critical aspect of the role involves identifying and implementing automation opportunities to streamline workflows and support scalability. The Controller will also be involved in preparing the annual budget, supporting due diligence for potential acquisitions, and driving improvements in commission reporting – owning the development, calculation and oversight of the process. Other duties include:

- Oversee day-to-day accounting operations, including timely and accurate recording of transactions, AP review, and outgoing payments
- Collaborate with fund and SMA operations to ensure proper recording and collection of management fees
- Create and maintain reconciliations for major balance sheet accounts (e.g., bank, credit card), resolving discrepancies promptly
- Prepare, review, and analyze monthly, quarterly, and annual financial statements
- Support the CFO with cash flow management, strategic planning, financial modeling, and development of key reports (e.g., departmental variance, profitability by platform)
- Identify and implement process improvements to increase efficiency, such as AP automation
- Manage the annual financial statement audit and coordinate deliverables with external tax advisors to ensure compliance with federal and state filings.
- Prepare monthly and quarterly commission calculations
- Supervise the AP Associate, with potential to grow the team as the company scales

EDUCATION AND EXPERIENCE

- Bachelor's or advanced degree in Accounting, Finance, or Business with a strong accounting emphasis. CPA or on CPA track preferred but not required.

- 7+ years of progressive accounting experience emanating from public accounting, asset management, investment management, or advisory services.
- Strong understanding of GAAP and practical application in complex environments.
- Experience managing month-end close processes, journal entries, and invoice imports.
- Familiarity with intercompany accounting and multi-entity structures is a plus
- Proficiency with NetSuite or similar ERP systems (experience with NetSuite is a plus).
- Expertise in Microsoft Excel, including advanced functions for financial analysis and reporting
- Exposure to Power BI or similar data visualization tools to support financial and operational reporting; experience preferred but not required

PERSONAL CHARACTERISTICS

- Demonstrates high integrity, strong moral character, a solid work ethic, and professionalism
- Strong communicator who builds relationships through direct, real-time conversations and collaborative engagement.
- Entrepreneurial mindset—proactive, agile, and comfortable operating in a lean, fast-paced environment
- Intellectually curious and solutions-oriented—willing to challenge the status quo and explore new tools and approaches for greater efficiency
- Highly detail-oriented with a focus on accuracy and continuous improvement
- Excellent interpersonal skills, the ability to inspire collaboration, and a track record of fostering trust among diverse groups
- Strong analytical and technical skills, sound judgment, and the ability to manage and prioritize multiple competing initiatives.
- Self-motivated and able to work independently

COMPENSATION

Compensation will be market-based, corresponding to the experience level, credentials, and personal characteristics of the candidate. A base salary will be supplemented by participation in a short-term incentive program. A full range of employee benefits will be offered to the successful candidate including: a 401(k) plan (matching provision); health, life, and optional disability insurance; vision and dental coverage.

APPLICATION PROCESS

CBIZ Talent & Compensation Solutions (“CBIZ”), an executive search firm, is assisting Tortoise Capital Advisors with this important search. All calls and inquiries should be made through the search firm. Nominations and applications will be held in confidence. Review of applications will begin immediately and will continue until the position is filled.

NON-DISCRIMINATION

Our client and CBIZ firmly support the principle and philosophy of equal opportunity for all individuals, regardless of age, race, gender, creed, national origin, disability, veteran status or any other protected category pursuant to applicable federal, state or local law.

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