



## Position Description

<b>Title:</b>	Finance Specialist
<b>Department:</b>	Administration
<b>Reports To:</b>	General Manager
<b>Type of Position:</b>	Fulltime
<b>FLSA Status:</b>	Non-Exempt
<b>Supervisory Responsibility:</b>	None
<b>Grade:</b>	4

### Position Summary:

Professionally performs essential budget and finance tasks to ensure financial security, strength, and integrity of Association finances. Provides oversight, development, implementation, and recommendation on all matters related to the Association's finances and budget.

### Essential Functions:

#### Financial

- Provides financial and accounting information, and oversight to financial management company to ensure accurate financial reports.
- Review of monthly and annual reports.
- Monitors individual budget line items monthly and drafts variance reports.
- Reviews and monitors banks accounts, investments, and related statements.
- Provides advice and recommendations to General Manager and Board on financial matters.
- Assist General Manager and auditor with annual review and audit.
- Drafts, updates, recommends, implements, and oversees internal financial controls for credit cards, petty cash, invoicing, etc.
- Assists Executive Administrator with delinquency tasks.

#### Budget

- Assists General Manager with the creation and monitoring of the annual budget.
- Assists General Manager with annual review and updates of the reserve study.
- Prepares budget packets for Committee, General Manager, Board, Residents.
- Distributes and communicates approved budget information to board, residents, staff, and contractors.
- Primary liaison to the Finance Committee and financial management company.

#### Other Functions:

- Writes finance/budget articles for Friday Flash, magazine, or community emails.
- Assist with the development of contract solicitations.

- Attends workday and evening staff, committee, and Board meetings.
- Assists with larger community festivals and events.
- Work with other staff on occasional special projects.
- Other duties, as assigned.

**Minimum Qualifications**

An employee must have the minimum following qualifications:

**Education and Experience:**

- College degree in finance or accounting; and/or
- A minimum of 3-5 years of finance, accounting, or similar experience to meet the essential functions of this job.
- Experience with community management a plus.

**Knowledge and Skills**

- Proficient in use of Microsoft Office Products, particularly Excel.
- Proficient in establishing self-imposed objectives/deadlines & their follow through.
- Conceptual knowledge of budgeting, cost control principles and Generally Accepted Accounting Principles.
- Ability to analyze financial data sufficient to assist with preparing financial reports, statements, and projections.
- Ability to identify problems, research alternatives and resolve problems or bring problems to the accounting firm or General Manager for resolution and/or direction.
- Excellent communication skills, both written and verbal.
- Highly organized; the ability to manage multiple projects; and to prioritize work.
- Be able to work with sensitive confidential information & exercise discretion.
- Well-developed inter-personal, problem-solving and customer service skills.
- Flexibility to work as part of a team or alone.

**Abilities:**

- Regular, skilled use of personal computers and other office machines.
- Physical strength to handle routine office materials, tools, and objects up to 15 lbs.

**Work Environment:**

- Office environment typically sits or stands, stretches, bends and stoops.
- Fairly regular daytime schedule with night and weekend work for meetings, events, and other essential tasks.
- Occasional outdoor environment, typically walks or stands on variable terrain, bends, or stoops. Participate in outdoor work for the occasional set up, breakdown and execution of community events. Ability to lift 15 lbs.

Note: This job description is not intended to be all inclusive. Employee may perform other duties as assigned to meet the ongoing needs of the organization.

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EMPLOYEE SIGNATURE

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DATE

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MANAGER SIGNATURE

\_\_\_\_\_  
DATE