

## Finance Associate

### PURPOSE OF POSITION

The Finance Associate provides administrative support to the Community Foundation Finance Department. This position supports the finance and fund administration responsibilities while providing outstanding customer service to internal team members, donors, fund holders, and the Nonprofit Accounting Service clients and donors. The Finance Associate is an integral part of the Community Foundation's financial administration.

### CORE COMPETENCIES

Adaptability/Flexibility | Multitasking | Organization | Attention to Detail/Accuracy | Initiative

### DUTIES AND RESPONSIBILITIES

#### Finance and Administration Department Support

- Prepares daily deposits including research of questions on incoming gifts and entry of iPhi profile information
- Processes donor gift acknowledgment letters accurately and in a timely manner. Coordinates with other departments to ensure accuracy. Monitors iPhi to ensure all letters have been completed.
- Distributes grant and accounts payable checks twice weekly; verifies accuracy of information on checks prior to distribution and follows any special instructions; inserts affiliate grant checks with a "term of grant" slip for the appropriate affiliate and mails checks in batches to the respective affiliates.

#### General Support

- Participates in the weekly rotation of backup support for reception duties and front desk coverage.
- Provides excellent customer service to internal team members, donors, fund holders, and the Nonprofit Accounting Service clients and donors.
- Creates and updates procedure manuals and processing guides related to position responsibilities.
- Monitors and assists in assuring an organized office environment.
- Performs individual and organizational record setup and updates in iPhi per Community Foundation guidelines and procedures.
- Maintains working files in accordance with the record retention policy. Formulates procedures for systematic retention, protection, retrieval, transfer, and disposal of records.
- Maintains confidentiality of Community Foundation affairs in communications, both written and oral, and assures such through appropriate filing and disposal of materials.
- Other duties as assigned, as they relate to the daily operations of the Community Foundation.

### QUALIFICATIONS

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

### **Education and Experience**

Associate's degree from a two-year college or business school preferred. Two to five years similar finance or accounting support experience; or equivalent combination of education and experience.

### **Language Ability**

Excellent writing, proofreading and critical thinking skills. Must have excellent interpersonal and communication skills. Ability to effectively present information to customers, clients, and other employees of the organization.

### **Cognitive Demands**

Proven ability to manage multiple projects and tasks simultaneously, set priorities, handle numerous responsibilities, and work both independently and in a team environment. Adaptable attitude, attention to detail, organized, self-starter, creative, requires little regular supervision. Able to interface well with a variety of people. Ability to apply common sense understanding to carry out instructions furnished in written or oral form.

### **Computer Skills**

To perform this job successfully, an individual should have extensive knowledge of Word, Excel, and Outlook. Database management and SharePoint experience preferred. Adept in learning new software tools. Able to work with and perform research on the Internet.

### **Physical Demands**

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. While performing the duties of this job, the employee is regularly required to sit and talk or hear. The employee is frequently required to use hand to finger, handle or feel. The employee is occasionally required to stand and walk. The employee must occasionally lift and/or move up to 20 pounds. Specific vision abilities required by this job include close vision.

### **APPLICATION PROCESS**

Interested applicants should submit their resume, cover letter and salary requirements [via this electronic form](#). We encourage anyone considering the position to apply. The Community Foundation is committed to pay equity and provides a comprehensive compensation package which includes annual salary and benefits benchmarking. Salary range will be shared with candidates prior to the interview process, or [upon inquiry](#). Initial applications will be accepted until the appropriate candidate is identified.