



United Way of Pettis County Position Description JOB TITLE: Finance Assistant/Administrative Assistant

JOB SUMMARY

The Finance Assistant is responsible for fiscal administrative duties in support of the United Way of Pettis County (UWPC) Executive Director and Board of Directors. Primary duties include bookkeeping, account management, and record keeping for UWPC programs and initiatives. Occasional duties may include administrative and project support, as assigned. This person reports to the Executive Director and provides support to staff members and volunteers. Hours are expected to average 20 hours per week.

EDUCATION & EXPERIENCE

Associate's Degree (A.A.) or equivalent from accredited two-year college or technical school and at least two years of successful data entry experience and/or office experience.

Ability to work well with staff and volunteers.

Strong knowledge and experience in the processing of Accounts Receivable/Payable.

Competent with QuickBooks or similar bookkeeping software. Competent in Donation Tracker or similar customer relationship database software. Competent with Microsoft office products, the use of the internet, e-mail and social media. Competent with updating website information. of office skills, keyboarding and computer applications such as Windows 97 or higher, Microsoft Word, Excel and QuickBooks (QB).

Excellent oral and written communication skills, and good phone etiquette.

Knowledge of clerical and administrative procedures and systems such as filing and record keeping

Ability to pass a background check

PRIMARY DUTIES AND RESPONSIBILITIES

1. Assure the maintenance of all United Way of Pettis County fiscal records. Handle payables, receivables, deposits, reconciliation of bank accounts, and postings to appropriate software.
2. Prepare and process employee payroll, tax and IRA information, and agency designations & allocations. Coordinate with Executive Director on the interface of entries between QB accounts Donation Tracker donor software.
3. Assist in retrieving, opening, and sorting incoming mail. Assist with processing and data entry of campaign and event revenues into QB and running requisite reports.
4. Monitor multiple bank accounts, PayPal, donation software and pay bills per Executive Director and Board approval.
5. Assist Executive Director with preparation of materials required for annual organizational audit.

6. Assist with year-end tax letters and donor recognition communications.
7. Assist UWPC Executive Director in maintaining and keeping timely records in donor and event databases.
8. Serves as recording secretary to the Board of Directors, as well as the Campaign Cabinet, board workgroups/committees, as assigned.
9. Keep an organized calendar of UW events and Board Roster
10. Coordinate volunteers for United Way of Pettis County events. Help support the volunteers that operate the UWPC Volunteer Center.

OCCASIONAL DUTIES

1. Serve as occasional receptionist for United Way of Pettis County. Assist in filing and backroom operations.
2. Assist UWPC Executive Director and volunteers in preparation of correspondence, special event materials, and project collateral.
3. Performs other duties as assigned.

EXPECTATIONS

Maintain a professional, positive image of United Way of Pettis County to the public always, promoting positive relationships between the office and its stakeholders. Maintain confidentiality and act with integrity and high ethical standards.

United Way of Pettis County is an Equal Opportunity Employer.