

**UNITED WAY OF THE MIDLANDS**  
**POSITION DESCRIPTION**  
**Last Revised: 7/7/2022**

<b>Position Title:</b>	Finance Support Specialist
<b>Department:</b>	Finance/Administration
<b>Supervisor:</b>	Director of Donor Services
<b>Position Status:</b>	Regular, Full-time, Subject to an Annual Review
<b>Job Classification:</b>	Non-Exempt <i>In compliance with the Fair Labor Standards Act, this position is classified as a non-exempt position and the employee is eligible for overtime. Some evening and weekend hours may be required.</i>

## **POSITION SUMMARY**

This role manages Tocqueville Society designation requests, acknowledgements, and other administrative tasks. This position also assists with pledge and payment processing and supports the VP of Finance and finance staff by performing administrative duties as required. Excellent customer service skills are required to promptly respond to inquiries from donors, agencies, and UWM staff.

## **ESSENTIAL DUTIES & RESPONSIBILITIES**

- Provides administrative support to Tocqueville Society including designation request processing, verification of 501(c)3 status of designated agencies, and preparation of pledge reminders and acknowledgements
- Maintains orderly files of Tocqueville documents and designation payouts
- Prepares acknowledgements for honorarium, memorial, stock, & IRA QCD gifts
- Assists with pledge processing and daily bank deposits
- Communicates with contributors, agencies, and company representatives, both verbally and in writing
- Set up and maintain designated agencies' vendor and ACH information as needed in MIP accounting software and Anybill accounts payable system
- Uploads designation payables into Anybill
- Regularly follow up on outstanding checks and returned ACH transfers for designation payments. Ensure proper steps are taken in the accounting software to resolve outstanding checks (void, reissue, etc.)
- Maintains vendor codes in StratusLive database
- Maintains petty cash and balances account monthly

- Provides administrative support and takes minutes for Audit and Finance Committee meetings
- Assists VP of Finance & Administration with scheduling and other administrative tasks as needed
- Serves on support team and rotates as back up support to the front desk
- Performs other duties as required

## **QUALIFICATIONS: EXPERIENCE, KNOWLEDGE, SKILLS & ABILITIES**

### **Required Qualifications**

- Associate Degree or two years of relevant experience
- Excellent communication skills, both written and oral, self-management and good judgment in decision making
- Proficiency in Microsoft Word, Outlook, and Excel
- Ability to prioritize projects and manage time effectively
- Ability to work independently with minimum supervision

### **Preferred Qualifications**

- Bachelor's Degree
- Experience with MIP accounting software and donor management software such as StratusLive
- Experience in a similar position or in a United Way organization

Qualified and interested applicants should apply at [applicant@uway.org](mailto:applicant@uway.org).