First United Methodist Church of Gilbert

Job Description: Financial Secretary
                        Part-time: 7 hours per week on average, paid hourly; needs to coordinate duties and
scheduled hours with Church Treasurer/Accountant

I. Organizational Relationship

   A. Reports to the Senior Pastor
   B. Supports the work of Finance Team and works with the Treasurer and Finance Ministry Team

II. Overall Functions, Duties, and Responsibilities

Principal Function of the financial secretary is to receive and record member offerings and gifts and to supervise the counting of same.

The following are more specifics:

- Maintain church's computerized system for individual giving records, posting weekly contributions received via offering plate (as reported on count sheets completed by count team), all donations received via mail or dropped off in the office, and all electronic giving sources
- Record all other payments received, such as classroom rent, devotional book sales, altar flower payments, etc. and prepare for bank deposit. Take deposit to bank
- Monitor/verify EFT reports and correspond with donors as necessary
- Prepare weekly deposit report summarizing all funds received and deposited each week
- Update Excel spreadsheet showing total funds received, and actual giving compared to budget
- Produce and mail or e-mail quarterly giving statements to donors. Also prepare and mail receipt letters for donors as requested by Pastors, Treasurer or donors. Prepare thank you notes for large donations
- Respond to donor questions regarding giving statements and related issues, and make any necessary corrections on a timely basis
- Prepare annual giving information for Table Ill and other reports for the District as needed
- Assist Stewardship team by providing information needed for annual Stewardship campaign. Enter and update pledge information and prepare summary reports for Treasurer, Finance, Stewardship, Capital Campaign, and other ministry teams as may be approved by Pastors or Finance Ministry Team, as needed during church budget process and pledge drives
- Management of the mobile card reader

- Determining/discussing with donors where their designated gifts fit within the pre-defined categories included in the Designated Funds policy adopted by the Administrative Board
- Maintain confidentiality of all individual giving records. Senior Pastor or Finance Ministry Team must approve access to confidential records by anyone other than Financial Secretary, Senior Pastor and Treasurer/Accountant
- Assign envelope #s to new members, regular givers
- Check signer as requested by Finance Team
- Prepare list of envelope numbers and submit to envelope vendor as necessary to ensure timely mailing of envelopes to donors
- At calendar year-end, monitor check dates, postmark dates, and other evidence to ensure giving is recorded in the correct calendar year
- Receive, record, and correspond with donors of Memorial donations

- Maintain Columbarium payment records for niches, placques, benches, etc.
- Prepare quarterly counter schedule
- Maintain confidentiality statements for all volunteer counters
- Update bank account information for new check signers when authorized by Ad Board
- Maintain records for special collections (i.e. Orchard Africa accounting)
- Maintain on-line giving page and update as necessary for new giving options

III. **Occasional Duties:**

- Attend Staff Meetings and Finance Ministry Team meetings
- Other duties as requested, time permitting

IV. **Skills, Qualifications and other Requirements**

- Ability to utilize appropriate current giving-record software and office equipment
- Ability to maintain computerized records and appropriate paper documentation
- Ability to maintain absolute confidentiality as it relates to our pastors and church members
- Ability to work in the office in a friendly, supportive manner with paid and volunteer staff
- Ability to communicate effectively
- Some accounting and/or banking industry experience desired
- Intermediate Excel knowledge (formulas, copying worksheets, etc.)
- Ability to use Word effectively