

# Staff Accountant

## Job Description

January 21, 2021



### General Description:

This full-time position is responsible for day-to-day accounting operations and general support of the Financial Services Department. As this person will be privy to very sensitive information, the highest level of confidentiality is expected/required.

### Responsibilities (include, but are not limited to):

- General bookkeeping and related data entry including deposits, disbursements, client account maintenance, and various tasks relating to investment fund management
- Loan servicing and file maintenance for the UMF loan programs
- Processing loan applications
- Preparation of tax returns for charitable trusts and nonprofit entities
- Answering clients' basic questions concerning accounts, including account balances, annual distributions, deposits/withdrawals, etc.
- Compiling and preparing reports and presentations for client meetings
- Scanning and related maintenance of historical records
- Other duties as assigned by the Director of Financial Services

### Minimum Qualifications:

- Bachelor's Degree in Accounting or Finance
- 4+ years of prior related work experience.
- Proficient computer and software skills, particularly with Microsoft Office Suite and QuickBooks
- Experience and proficiency with paperless workflow systems
- Ability to prioritize conflicting needs and demands of the job
- Demonstrated ability to follow through on projects to completion

### Preferred Qualifications:

- Master's Degree in Accounting or Finance, or CPA credential
- Experience with trust accounting software such as FIS Sungard
- Prior experience and/or direct knowledge of church ministries or similar 501(c)(3)s
- Demonstrated passion for nonprofit work

### Requirements:

Work regularly scheduled hours of operation for the United Methodist Foundation of Western North Carolina and as needed to complete responsibilities pertaining to the position. Support the mission of the United Methodist Foundation to build the Church for generations to come. Abide by the guidelines of the UMF Employee Handbook as approved by the Foundation's Board of Directors.