

FINANCIAL ASSISTANT | Job Description

Date: August 14, 2025

Position Reports to: Pastor

Prepared by: Pr. Amanda Applehans

Status: part time/hourly
(based on experience)

Hours: 4 to 8 hours/week; day varies/flexible according to workload

Position Summary:

The position provides coordination and organization of the financial operations of the church with the Treasurer who shares all communications with the Leadership Board and the Pastor. The Financial Assistant is the hub for communications with the members, the Pastor and other staff members regarding financial matters. They will maintain all financial data regarding contributions, paying invoices, running reports for the Treasurer and submitting the bimonthly payroll. They are a vital part of the staff team in carrying out the mission of the congregation.

Areas of Responsibility:

Communication

- Warm greeting and welcome to people who have questions or concerns regarding financial matters by phone, email, as well as for those who enter the office in person;
- Efficient and timely distribution of financial reports to the congregation regarding contributions to Galilee;
- Navigate multiple communication platforms including but not limited to, QuickBooks, ChurchTrac, Microsoft Excel, Microsoft Word, Portico, ISolved and HP Instant Ink;
- Align communication across all platforms in partnership with other church staff, the Treasurer, the stewardship coordinator and congregational ministry leaders on all financial matters.

Financial Duties

- Record all weekly contributions in Church Trac and generate reports;
- Maintain a spreadsheet to calculate pledged and non-pledged amounts;
- Record deposits in Quickbooks for weekly contributions and Online giving;
- Produce and send out quarterly/year end statements to member;
- Record all pledges in Church Trac;
- Assist stewardship in yearly appeal;
- Prepare vouchers for incoming bills;
- Prepare checks for accounts payable and send out signed checks;
- Maintain timesheets for Payroll, Complete and enter bimonthly into ISolve. Enter payroll figures in QuickBooks;
- Maintain member spreadsheet for submitting to Budget Envelopes;

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- Filing all accounts payable info, also purging files yearly and storing for appropriate retention period and then having them shredded;
- Calculate and prepare check for ELCA and other monthly benevolences;
- Assist Office Coordinator in updating ChurchTrac info;
- Maintain/update Lutheran subscription orders;
- Enter budget into QuickBooks (budget prepared by Treasurer with assistance from Financial Assistant);
- Month end reports for Treasurer;
- Special assignments when asked;
- Submit ELCA report (financial portion) via web by deadline;
- Maintain energy report and email to appropriate person(s);
- Crosscheck bank statement with QuickBooks. Make any changes/addition necessary and email person responsible for balancing the checkbook;
- Other duties as assigned.

Qualifications

1. Brings experience in financial matters with demonstrated competency in computer-based systems and programs for finance including Quickbooks, Excel and ChurchTrac.
2. Experience in applying for Grants.
3. Possesses excellent written and verbal communication skills.
4. Is an independent self-starter with good social skills, a good team communicator and must be flexible.
5. Can effectively prioritize and complete multiple tasks at the same time and meet deadlines.
6. Demonstrates a high level of integrity and ability to maintain confidentiality
7. Pays attention to detail..

Physical Demands:

Most work is performed in a small office environment. The majority of the time is spent seated at a desk with access to a telephone and computer. The job also requires having access to the walk-in safe downstairs and to transport boxes of files to safe, possibly more than 40 pounds. Duties include some visual strain resulting from close detail work and long sessions sitting in front of a computer monitor.

Mental Demands:

The duties of the position require organizing multiple financial things at one time and coordinating work with many people. Ability to receive feedback, integrate new ideas, communicate mission and to respond with respect and clarity is necessary.