



**Waukesha
Foundation**

Board of Directors Treasurer Description

Are you looking for an exciting board opportunity to connect with your community and have an impact on society? Are you an experienced accountant looking to use your knowledge and expertise to ensure effective financial oversight and success at a local non-profit organization? Do you have a passion for education and a desire to assist an organization that supports college students through scholarships? The UWM at Waukesha Foundation is seeking a Treasurer as a new board member who will help the organization meet its financial management objectives.

The Foundation's mission is to support the campus and the academic activities of the University of Wisconsin-Milwaukee at Waukesha by raising, receiving, and distributing funds to benefit and assist the students, faculty, programs and community partners. As a Board member, you will make a commitment to actively support the Foundation in achieving its mission by participating on committees, initiating strategic projects, and building effective relationships to ensure the successful operation of the Board.

The Treasurer:

- is responsible for leading the Board in achieving its fiscal objectives and informing them of the Foundation's financial performance
- regularly attends Board meetings and participates in various standing committees
- communicates regularly with the Foundation's staff, local CPA, and other committee members to obtain necessary information for financial reporting

Other responsibilities include:

- Overseeing the completion of payroll and tax return filings
- Assisting in the review of journal entries and other general ledger maintenance within QuickBooks
- Building and tracking annual budget for the operations of the Foundation
- Performing financial analyses and projections for new scholarships or programs considered by the Foundation
- Performing reconciliations of endowment accounts and present financial performance of endowment accounts
- Reviewing and presenting quarterly and yearly financial statements to the Board

Treasurer is a volunteer position which requires approximately eight hours per month. This is hands-on experience for anyone looking to bolster their financial management, operational, leadership, and many more skills that come with being a go-to financial resource for the Foundation. If you have interest, please send us a message via LinkedIn, contact info@uwmwaukfoundation.org, or call 262-521-5570. Don't miss this exciting and fulfilling opportunity!