

**Unity Presbyterian Church
Position Description for
FINANCIAL MANAGER**

This is a salaried (exempt) full-time management position and qualifies for full-time benefits as defined in the Unity Employee Handbook. The Financial Manager is regularly scheduled to work 40 hours per week, generally Monday-Friday in the church office from 9:00 am to 5:00 pm, but as attendance at evening meetings is expected for consultation with the Session, the Stewardship Ministry Team, and the Endowment Board, the Financial Manager may have some flexibility in scheduling office time during the week in consultation with their supervisor. This position reports to the Senior Pastor / Head of Staff and is responsible to the Session through the Human Resources Ministry Team.

Overview:

The Financial Manager manages Unity Presbyterian Church's budget, contributions, and cash flow and accounts for them appropriately; monitors the financial health of the church and its auxiliary funds (preschool, endowment, Women of Unity, designated and restricted accounts) and provides for their financial functions; works with the Stewardship Ministry Team, Church Treasurer, and church staff to balance spending between current mission and long-term goals; coordinates communication of the church's financial health to appropriate groups; and supervises two administrative staff.

Core Attributes of Position:

The individual occupying this position will also be assessed on, at least, an annual basis related to their performance on the core attributes of this position. The nature of this position is one of being very interactive, collaborative among pastors, staff, members, and visitors. The spirit of this position is reflective in a positive, supportive, and "can do" attitude in dealing with the pressure of meeting multiple deadlines with high quality deliverables. The tools of this position include face-to-face interactions, telephone, email, and other tools of communication and relationship building. This individual should possess strong analytical skills. This position will demonstrate a high level of confidentiality in handling information verbally, electronically, and in print.

Specific Tasks of Position:

1. **Financial Management** – with assistance from the Church Treasurer, Church Administrative Assistant, and Stewardship Ministry Team:
 - a. Manage income through contribution designations, "other income" records, supervising/reconciling individual giving records, and managing auto-draft and on-line giving.
 - b. Manage the church's expenses and cash flow; implement cost saving practices; and provide required tax reporting.
 - c. Maintain employee records and prepare payroll and related tax reporting for both church and preschool employees.

2. **Budgeting** - with assistance from the Church Treasurer and Stewardship Ministry Team:
 - a. Coordinate the preparation of the annual budget.
 - b. Coordinate and/or facilitate annual Stewardship Campaign and related project.
 - c. Prepare a narrative budget to be used as part of the annual Stewardship Campaign.
 - d. Provide Capital Campaign data analysis, projection work and assist in communication.

3. **Endowment** – with the Endowment Board:
 - a. Maintain records and provide regular reports on Endowment funds and anticipated gifts to the Endowment Board and the Session.
 - b. Prepare annual report on the Endowment for the Session and Congregation.

- c. Coordinate the annual grant application, review, and awarding process with the Endowment Board, as well as any related project and events.
 - d. Coordinate the communication of the impact of Endowment grants to the congregation and donors.
4. **Personnel Management** – with assistance from the Senior Pastor/Head of Staff:
- a. Onboard new employees for background checks, new employee reporting, E-Verify reporting, I-9, Handbook sign-off and other documents pertinent to the position.
 - b. Serve as the administrator for the Board of Pensions and the Retirement Savings Plan.
5. **Communication**
- a. Provide timely financial statements to Session, Diaconate, South State Bank, Providence Presbytery and the General Assembly for the PCUSA.
 - b. Provide detailed financials to ministry teams monthly and upon request.
 - c. Coordinate and facilitate communication from the Stewardship and Endowment committees in the format as is appropriate.
 - d. Provide letters to donors for non-cash donations, such as stock.
 - e. Provide Endowment contribution acknowledgements and periodic updates to all contributors to the Endowment.
6. **Administrative**
- a. Serve as supervisor for the Church Administrative Assistant and Receptionist.
 - b. Serve as staff representative on Stewardship and Endowment Program ministry teams and a board member for Unity Preschool
 - c. Serve as primary contact and agent for reservation of Unity Columbarium niches, tracking payment arrangements if needed, maintaining inventory, and initiating letter to Gauden for inscription at time of use.
 - d. Evaluate and distribute financial emergency need requests from community individuals.
 - e. Arrange shredding services for confidential documents.

Skills Requirement:

Financial Manager should have at least a bachelor’s degree in accounting, a CPA is preferred, and possess an understanding of fund accounting and reporting; an understanding of appropriate internal control procedures; an understanding of payroll and not-for-profit tax law; ability to communicate with a variety of people and personalities; and ability to carry out duties with discretion. Previous experience in a church financial setting is a plus.

In addition to the skills indicated by this position description, computer knowledge and use, including proficiency with Microsoft products (Word, Excel, Outlook, etc.), REALM, financial accounting systems and Internet. Knowledge and use of office equipment are also skills required for this position.

Physical Requirements:

Must have hand/eye coordination for use of office equipment – telephone, computer, fax, printer, copier, scanner, and related equipment. Be able to walk through and around buildings for literature distribution, etc. as well as across campus to the post office. On occasion, climb stairs, bend down to organize and store supplies, assist in setting up tables and displays and carry items of moderate weight (paper, materials, supplies, etc.).

Approved by Session / Human Resource Ministry Team – **May 26, 2026**