

Position Description

Finance Director

Function

Acts as a financial officer and adviser to the chapter board of directors. Maintains the chapter mailbox and distributes mail to the appropriate board member. Sends invoices to members as needed. Files appropriate forms and information with the IRS. Maintains chapter financial records.

Responsible To

Chapter membership
Chapter president

Responsibilities

- Fulfill the role of financial officer and advisor.
- Assess the financial implications of proposed actions by the board of directors and inform the board prior to final decisions being made.
- Maintain chapter financial records including, but not limited to the bank account(s) reconciliation, balance sheet, income statement, and monthly financial summary for the board of directors.
- Observe and guide the financial direction of the chapter, recognize possible financial problems, and bring such problems to the attention of the board for action.
- Prepare an annual budget in conjunction with the president and board of directors.
- Maintain the chapter mailbox and distribute mail to the appropriate board member.
- File appropriate forms and information with the IRS, SCC, etc. annually as required to maintain chapter's non-profit status.
- Receive, hold, and safeguard in the capacity of trustee and financial agent, all funds of the chapter.
- Disburse chapter funds only for normal and usual uses to satisfy chapter liabilities unless the chapter's board of directors otherwise directs.
- Greet and check-in members and guests at monthly chapter meetings; accept funds and provide receipts; pay meeting venue and catering fees as applicable.
- Coordinate an external audit of the chapter's finances every two years in conjunction with that year's annual tax filing.
- Maintain the chapter sponsorship program; invoice sponsors for payment; maintain a list of active sponsors.
- Promote the SHRM Foundation to chapter members and oversee fundraisers to benefit the SHRM Foundation in conjunction with the SHRM Foundation Chair.
- Coordinate the chapter's financial donations and sponsorships of community organizations and partners.
- Attend all monthly membership and board of director meetings.



- Participate in the development and implementation of short-term and long-term strategic planning for the chapter.
- Promote chapter sponsorship and partnerships in the business community.
- Participate in SHRM Core Leadership Area (CLA) conference calls and webinars as applicable.
- Follow the SHRM Code of Ethics.
- Represent the chapter in the Human Resource community.
- Perform other duties and projects as needed.

Requirements

Must be a SHRM national and chapter member in good standing.