

Celo Friends Meeting Job Description

Finance Committee Clerk

Approved May 2024

Overview

The key role of the Finance Committee Clerk is to advise Celo Friends Meeting on healthy financial practices, facilitate Meeting's financial decisions, convene the Finance Committee, and maintain oversight of legal responsibilities.

Job Duties

Call and facilitate the Finance Committee meetings and projects. Write the annual fund-raising letter. Audit or provide oversight of the CFM books through Quick Books.

Be available to answer CFM Committee Clerk questions regarding budgeting. Attend MFWAB. Attend (or assign regular attendance by a Finance Committee member) all Margithaus Committee meetings. Provide assistance to Meeting committees as needed regarding financial matters. Act as Meeting's liaison for the Abrahamson Trustees.

Provide support for the Bookkeeper when questions arise, particularly committee over-expenditures and novel funding needs. Review Meeting's bank accounts both in Quick Books and online and become familiar with the accounts and their uses.

Become familiar with Quick Books in order to attain financial reports, (quarterly and End of Year) which would then be reported to Celo Friends Meeting on the budget and financials. Develop a thorough understanding of Meeting's various accounts.

Maintain confidential records of Friend's donations and other relevant financial matters.

Manage the Meeting's money with attention to Federal and State Tax Laws and all things legal, e.g. liability. Researching and alerting friends to these matters.

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