

## **Job Description**

**Job Title:**

Associate Director of Finance

**Reports To:**

Finance Director

**FLSA Classification:**

Exempt.

**Creation/Last Revised:**

3/2025

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**Job Summary:**

The Associate Director of Finance supports the Director of Finance with the overall financial activity for FSPA. This position ensures stewardship through financial planning that is mindful of the need to provide resources for mission while meeting the needs of the FSPA community. This role will lead a team of employees with a positive, open- door atmosphere and effective communication, leading by example and ensuring outstanding attention to detail. The Associate Director of Finance will actively promote and live the FSPA core values of respect, compassion, partnership, integrity, hospitality, and discovery.

**Job Type:** Full-Time**Education & Experience:****Required:**

- 5+ years of professional accounting or financial management
- BA in Finance or Accounting or equivalent
- Leadership experience of financial functions such as AP, AR, and Payroll
- Proficient use of and experience implementing accounting and payroll software systems

**Preferred:**

- Master's degree in Business Administration, Accounting or Finance
- Experience in non-profit accounting

**License requirements:**

- Certified Public Accountant (CPA) License preferred

## Essential Duties:

- Identifies with and displays a commitment to the mission, philosophy and core values of the Franciscan sisters of Perpetual Adoration.
- Supervises the Finance Assistant I and Finance Assistant II.
- Monitors and provides recommendations for improvements in accounting policies and procedures.
- according to established policies.
- Monitors and supports our financial advisors in incorporating ESG and DEI initiatives within our investments
- Prepares analytics and reporting on all financial statements, including income statements, ledger activity, tax returns, and governmental agency reports.
- Assists with the annual financial audit.
- Directs the work processes and continuous improvement of staff and the environment of the finance department through education and training opportunities.
- Supports the Director of Finance with the provision of planning and research as requested by the Leadership Council and Stewardship Finance Council.
- Prepares financial reports and analytics for the Leadership Council and Stewardship Finance Council.
- Assists in the review of contracts and lease agreements.
- Supports the budgeting process and routine review of financial performance through collaboration with department managers, along with the long-term forecasting of the organization.
- Participates or works with Director of Finance in Corporate Responsibility Programs.
- Participates in quarterly meetings with portfolio managers.
- Assists with the renewal and updates of insurance coverage, supports the filing of claims as needed, and ongoing driver/automotive evaluations according to established policies.
- Participates in national and state meetings of religious finance personnel as appropriate, i.e., Resource Center for Religious Institutes, Wisconsin Treasurers of Religious Institutes, Seventh Generation, Interfaith Center for Corporate Responsibility, Francesco Collaborative, and Economy of Francesco
- Keeps updated in finance and investment related topics per regulatory entities, as directed by the Director of Finance.
- Participates in development opportunities provided by FSPA Training and Development, and those identified through individual development plans with the Director of Finance.
- **\*\*Other Duties as Assigned\*\***

## **Knowledge, Skills, and Abilities:**

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- A demonstrated high level of integrity and honesty, guided by a sound set of ethical principles.
- Excellent analytical and organizational skills.
- Organizational budgeting, activity-based planning, and forecasting.
- Knowledge of investments, public, private and impact preferred.
- Knowledge of shareholder advocacy and proxy voting preferred.
- Demonstrated ability to maintain confidentiality.
- A respectful, caring, and compassionate leader who can build a strong and inclusive environment for all.
- Ability to network and delegate.
- Strong, demonstrated relationship skills that foster trust and teamwork and a common focus on service and excellence.
- Manages change with high levels of self-confidence.
- Philosophical focus on the mission of the FSPA and stewardship of the FSPA's resources.
- Excellent communicator (verbal, written, and presentation skills) who has a listening presence and speaks effectively.
- Self-driven; willing to work through complex, detail-oriented projects; balanced approach to continuous improvement plans
- Strong knowledge of diversity, equity, and inclusion (DEI) and a commitment to creating an inclusive environment within the Finance department.

## **Physical Requirements:**

The physical demands described here are representative of those that must be met by an employee to perform the essential functions of this job successfully. *Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.*

While performing the duties of this job, the individual is regularly required to sit and talk and hear. The individual is required to move throughout the building, different locations, use a computer, frequently lift and/or move up to 10 pounds and occasionally reach with hands and arms. Specific correctable vision abilities required include close vision, distance vision, color vision, peripheral vision. Depth perception and ability to adjust focus.

**Work Environment:**

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Work is performed in a temperature-controlled office environment. Generally, a busy office area that is subject to frequent interruptions. The noise level is usually quiet to moderate.

**Prerequisite:** Drug screen, Tuberculosis screening test, Reference check, Background Check.

**Disclaimer clause**

The above statements are intended to describe the general nature and level of work required of the job. They are not meant to be an exhaustive list of all responsibilities, duties and skills required. FSPA reserves the right to change job responsibilities, duties and hours as needed.

I have read and understand the job description. I agree to accept the responsibilities and duties as outlined.

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Signature

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Date