

**JOB DESCRIPTION**  
**UNITED WAY OF CENTRAL MINNESOTA**

**Job Title:** Finance Associate  
**Status:** Full Time (40 hours) Exempt  
**Supervisor:** Vice President of Finance & Operations  
**Work Week:** Flexible Hours and Hybrid Office Schedule

**GENERAL**

The Finance Associate is responsible for accurate financial reporting through execution of accounting functions within the organization.

**KEY AREAS OF RESPONSIBILITY**

**Accounting & Technical Skills**

- Understanding of general accounting principles and non-profit reporting
- Proficient in working with Excel including, but not limited to: General Use; PivotTables; VLookups; Concatenate; Advanced Formulas and Formatting
- Experience working with QuickBooks or other similar accounting software.

**Accounting & Financial Reporting**

- Manage day-to-day accounting functions including: accounts receivable/payable, cash receipts, investment reporting, and other general journal reporting
- Works closely with finance staff and resource development team to ensure accuracy of accounts receivable reporting. Facilitates collection process and sends out timely invoices.
- Reconciles bank and investment accounts on a monthly basis
- Evaluates balance sheet accounts at month end for accuracy of balances.
- Prepares accurate and timely financial statements for the VPFO to review and present to the Finance Committee
- Maintains necessary internal control practices and procedures
- Reviews financial data prepared through CRM system for accuracy
- Makes bank deposits as needed
- Processes checks for grant contracts, donor designations, and operating expenses
- Completes ancillary worksheets to reconcile grants, program funds, credit card transactions, etc.
- Prepares monthly grant reporting for community impact leadership
- Facilitates annual budget process for entire organization

### **Data Base Reporting**

- Processes pledges, facilitates setup of e-pledge & web donations, and completes transactions in a timely and accurate manner.
- Reviews campaign and accounts receivable envelopes for accuracy, provides training as necessary, and closes pledge envelopes
- Manages accuracy of donor accounts including demographic, finance, and web portal
- Understanding different revenue streams and applicable reporting
- Provides on-demand reporting from CRM system to staff as requested.
- Assists VPFO with Data Base II reporting for United Way World Wide.
- Processes adjustments to pledge/revenue in Andar as necessary

### **General**

- Supports all functions of business administration, finance, & operations.
- Maintains procedural and training documentation in finance files
- Facilitates training with staff on procedures and reporting processes, as needed

### **Required Competencies**

- Ability to solve problems quickly and effectively
- Highly organized with strong attention to detail
- Capacity to handle multiple projects simultaneously
- Willingness to take on other responsibilities as needed to support the overall goals of the organization
- Demonstrates the ability to share ideas and works well with others. Will ask questions, provide feedback, and respond to others in a way that shows compassion and attentiveness
- Ability to complete highly responsible work with minimal supervision
- Strives for innovation and looks for ways to continually improve processes
- Conducts independent research on issues for continued growth and is capable of problem solving with minimal direction
- Leadership skills, including driving impact across teams

### **Other Duties**

Please note this job description is not designed to cover or contain a comprehensive listing of all activities, duties, or responsibilities that are required of the employee for this position. Duties, responsibilities, and activities may change at any time with or without notice.

### **Finance Software Systems Used by UWCM**

- Andar (CRM System)
- Quickbooks

UNITED WAY OF CENTRAL MINNESOTA

JOIN THE FIGHT.

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### MINIMUM QUALIFICATIONS

- Associates in Accounting or related experience
- Bachelors in Accounting (preferred)
- Microsoft Excel (5+ Years)

Please send any applications or questions to Brittany Prellwitz, VP of Finance & Operations.

### **Brittany Prellwitz, CPA, MSA**

Vice President of Finance & Operations

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