

**Title:** Financial Assistant

**FLSA Status:** Non-Exempt

**Reports to:** Financial Manager

### **Position Summary**

The Financial Assistant is responsible for providing clerical, financial, and other general office services to support the day-to-day finance transactions.

### **Reasonable Accommodation Statement**

To perform this job successfully, an individual must be able to perform each essential duty listed below satisfactorily. Reasonable accommodations may be made to enable qualified individuals with disabilities to perform the essential functions.

### **Essential Functions Statement:**

- Maintain and update financial records with daily transactions.
- Upload, pay, analyze, and annotate bills.
- Issue credits, charges, and other such transactions using company software.
- Track and request outstanding balances due to Company or clients.
- Collect and enter data into spreadsheets.
- Make copies and scans of documents.
- Create, handle, and transport company documentation.
- Upload both confidential and non-confidential pictures and documents to company Software.
- Handle and file both confidential and non-confidential documents.
- Maintain physical and online records as specified by assigned tasks, supervisor, and/or Company policy.
- Perform general office duties, such as creating or maintaining documentation, cleaning and tidying common areas and organizing inventory.
- Attend required meetings.
- Answer work-related correspondence via email.
- Complete any other tasks assigned to this position by Company.
- Cover other roles within the office as needed.

### **Competency Statements:**

- Shows up to work on time, and follows instructions, policies, and procedures. Meets productivity standards, deadlines, and work schedules.
- Stays focused on tasks despite distractions and interruptions.
- Makes the best use of available time and resources.
- Competently operates office equipment as required, such as computers, technology, copiers.
- Maintains an open, approachable manner, and treats others fairly and respectfully. Preserves others' self-confidence and dignity and shows regard for their opinions.
- Prioritizes tasks by importance and deadline. Discerns what is crucial from what is just urgent. Adjusts priorities as situations change.

- Encourages team unity through sharing information or expertise, working together to solve problems, and putting team success first.

**Supervisory Responsibility**

This role has no supervisory responsibilities.

**Work Environment**

This job operates in a clerical, office setting. This role routinely uses standard office equipment such as computers, phones, photocopiers, filing cabinets and fax machines. The Financial Assistant position requires some travel during working hours by car.

**Physical Demands**

This is a largely sedentary role with the physical abilities below may be required.

Stand	O	Reach above shoulder	O
Walk	O	Climb	N
Sit	C	Crawl	N
Reach Outward	O	Squat/Kneel/Bend	O
<u>Lift/Carry</u>		<u>Push/Pull</u>	
10 lbs or less	O	10 lbs or less	O
11-20 lbs	N	11-20 lbs	N
21-50 lbs	N	21-50 lbs	N
50+ lbs	N	50+ lbs	N

N (Not Applicable)	Activity is no applicable to this occupation
O (Occasionally )	Occupation requires this activity up to 33% of the time (0-2.5+ hrs/day)
F (Frequently)	Occupation requires this activity up to 33%-66% of the time (2.5-5.5+ hrs/day)
C (Constantly)	Occupation requires this activity up to 66% of the time (5.5+ hrs/day)

**Position Type and Expected Hours of Work**

This is a Full-time position with typical working hours of Monday through Friday, 8:00 a.m. to 5:00 p.m. Hours and work shift may change in accordance with business needs.

**Required Licenses and Experience**

Licenses: Valid Driver’s License

**Preferred Education and Experience**

**Education:** Highs school diploma or GED equivalent.

**Experience:** 1+ years previous experience as a Finance Assistant or similar role.

**Computer Skills:** Microsoft Word and Excel ; Google Docs and Google Sheets.

**Additional Eligibility Qualifications**

Must be able to accomplish all duties with little to no assistance.

**Other Duties**

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

**AAP/EEO Statement**

Braden Group is an Equal Employment Opportunity Employer. Employment decisions are made without regard to race, color, religion, sex, sexual orientation, gender identity, national origin, disability, veteran status, or other characteristic protected by law

**Signatures:**

Employee signature below constitutes employee’s understanding of the requirements, essential functions, and duties of this position.

Employee \_\_\_\_\_ Date \_\_\_\_\_

Company Representative \_\_\_\_\_ Date \_\_\_\_\_

The company has reviewed this job description to ensure that essential functions and basic duties have been included. It is intended to provide guidelines for job expectations and the employees ability to perform the position described. It is not intended to be construed as an exhaustive list of all functions, responsibilities, skills, and abilities. Additional functions and requirements may be assigned by supervisors as deemed appropriate. This document does not represent a contract of employment, and the Company reserves the right to change this job description and/or assign tasks for the employee to perform, as the company deems necessary.