

XP pastor

Expanding the Business Brain + Pastoral Heart

Sample Role Description

Finance Director

This person reports to: _____. Works: 40 hours per week. Ministerial if commissioned or ordained. Direct Reports: Finance office personnel.

Scope

The Finance Director oversees the day-to-day financial issues of the church. The Director works closely with the Finance Team to review financial issues.

Accounting & Bookkeeping—30%

- Budget planning, implementation & control.
- Banking.
- General ledger maintenance & review. Accounts payable oversight; review all fixed assets, use tax and appropriate approvals.
- Retirement plan administration.
- Sunday offering pick-up and security.

Reporting—30%

- Payroll oversight & reporting. Quarterly sales & use tax. File annual special exemptions.
- Budget reporting & review. Financial records & reports.

Special Projects—15%

- Stock donations, Trust & Estate Administration.
- Troubleshooting—congregational or staff questions.

Finance Team and Audit—10%

- Recommend individuals to the Board for appointment to the 4-6 person Finance Team: Best practices for members include a CPA, a lawyer, an entrepreneur and other business people; Scope of the team looks at finances, risk management, contracts, legal issues, health insurance reviews, property insurance reviews, etc. It is also good to have a pastoral staff member on the team for a pastoral perspective. Meet regularly with the Finance Team to review and make team recommendations to the Board.
- Coordinate the annual Audit. Share the Audit report and Management Letter with the Board. Coordinate the financial aspects of the 3x a year internal audits.

Stewardship—15%

- Evaluate and oversee stewardship in the church: New donor letters, annual vision reports, and quarterly update to donors that shows ministry.