



1141 Kimberton Road, Chester Springs, PA 19425

Think Boldly. Solve Creatively. Lead Compassionately.

Finance Specialist

Position Purpose

Montgomery School seeks a Finance Specialist to ensure the timely and accurate processing and recording of financial transactions and to support the CFO in managing the school's finance and human resources functions.

Primary Responsibility

The Finance Specialist serves as the school's lead accounting officer. The Finance Specialist manages the accounts payable and purchasing processes, including student billing. The Finance Specialist also supports the HR functions of the school, including the payroll and benefits administration.

Specific duties include but are not limited to:

1. **Financial Recordkeeping:**
 - a. Maintain accurate records of all financial transactions in the general ledger.
 - b. Reconcile bank statements, credit card statements, and other financial accounts on a monthly basis.
 - c. Process accounts payable and accounts receivable, ensuring timely payment of invoices and collection of receivables.
2. **Payroll Processing:**
 - a. Assist with payroll preparation and ensure accurate and timely disbursement of employee salaries.
 - b. Maintain payroll records and ensure compliance with all applicable tax and legal requirements.
3. **Tuition and Fees:**
 - a. Manage the billing and collection of tuition and fees from families.
 - b. Maintain accurate records of tuition payments, assist families with payment plans, and follow up on delinquent accounts.
4. **Budgeting and Reporting:**
 - a. Assist the CFO in preparing and monitoring the school's annual budget.
 - b. Generate financial reports, including balance sheets, income statements, and cash flow statements.
 - c. Provide support during audits and assist in preparing financial statements for board meetings.
5. **Compliance and Documentation:**
 - a. Ensure compliance with federal, state, and local financial regulations.

- b. Maintain documentation for audits and ensure proper filing of tax returns, payroll forms, and other financial reports.
6. **Human Resources:**
 - a. Ensure Employee Handbook policies are timely updated, known and followed
 - b. Assist the CFO with staff communications to ensure prompt response and clear guidance on HR, payroll, retirement, and benefits issues.
7. Collaborate with colleagues and positively participate in professional development, adult learning initiatives, and program development opportunities afforded by the school.
8. Actively promote outdoor learning, character education and student focus on authentic engagement.
9. Other duties as assigned which support the mission and high functioning of the school. Including but not limited to:
 - a. Support special projects as assigned by the CFO.
 - b. Assist with fundraising financial recordkeeping, including grants and donor contributions.
 - c. Provide support to other departments with financial and budget-related inquiries.
 - d. Maintain and optimize relationships with essential financial institutions and vendors such as bank representatives, benefits providers, payroll servicing companies, etc.

Candidate Requirements:

Joining our support team means you will grow and shape the unique learning environment defined by Montgomery School's [mission and values](#). Our team is made up of adult learners who focus on personal growth and professional development. In addition to remaining current in the skills and trends in their field, Montgomery administrators embrace signature strengths of the school including outdoor learning, character education and student focus on engaging and positively impacting their world. They support Montgomery's educational focus on developing the whole child.

Specific Requirements include:

- Bachelor's degree in accounting, finance or related discipline, or related discipline or equivalent experience.
- 2-3 years' experience in an accounting or financial role, preferably in an independent school or nonprofit setting.
- Excellent customer service and interpersonal skills, with proven ability to work with a diverse community.
- Exceptional analytical and organizational skills, with meticulous attention to detail and problem-solving abilities.
- Proficiency in Google Suite and Microsoft Office, including Google Sheets and Excel
- Familiarity with Independent School data systems a plus (Veracross, School Admin, Finalsite)
- Experience with accounting systems, preferably QuickBooks.
- Ability to multitask and work under pressure; flexible in a fast-paced environment.
- Ability to work independently, as well as in a team setting.

- Professional work habits and the ability to handle confidential information with discretion.

The school is an Equal Opportunity Employer and actively seeks to forward diversity through its programs and hiring. Interested applicants should submit a cover letter and resume to msjobs@montgomeryschool.org