

**CHIEF FINANCIAL OFFICER**  
**Board Member**  
Greenville Unitarian Universalist Fellowship  
1135 State Park Road • Greenville, SC 29609

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**MISSION STATEMENT:**

To facilitate decision making with the support of fellow trustees in a manner in which the Fellowship would concur that their interests and concerns are being respected and addressed.

**QUALIFICATIONS:**

Some understanding of basic bookkeeping, comfort level with computers and ability to produce financial projections on spread sheet software. Presentation skills enough to feel comfortable in front of large groups.

**OVERALL RESPONSIBILITIES:**

Responsible for the financial matters of the Fellowship. Subject to approval of the Board, the CFO is also responsible for appointment of a Treasurer, investment of funds, annual operating budget, pledge drive and assist in various fund-raising.

**FUNCTIONS:**

1. To review monthly financial statements for the operating fund, capital fund, endowment fund and to monitor GUUF income needs.
2. To meet with Finance Committee monthly to discuss financial statements, budget preparations and other matters which need financial perspectives.
3. To discuss audit report with finance committee and the Board and take corrective action as needed.
4. To coordinate budget preparation with Board members and committees and to oversee the annual canvass fund drive.
5. To work with the home committee and the Board to schedule major capital projects in accordance with Capital Fund income.
6. To work with the endowment committee to encourage contributions and assure any expenditures are in accordance with the funds purposes.
7. To provide periodic financial projections and to interpret the data for the Board and the congregation and to make recommendations regarding financial matters.
8. To provide back up for the Treasurer in receiving, coding and securing the Sunday offerings.
9. To work with the finance committee to send out fiscal year end pledge statements in July and mid-year statements in January, to prepare cover letter, sign statement copies and answer questions regarding pledge statements.
10. To verify that all church properties are properly insured and tax exemptions are filed.
11. To assure that all the important documents are properly filed in a safe deposit box (e.g. UUA Charter, Agreement with Minister, Property & Tax documents.)
12. To set financial policy & procedures in consultation with the treasurer, the finance committee and the Board.
13. To handle non-cash contributions:
  - a) Liquidate stock gifts, report cash received as pledge versus offset, and write acknowledgments.

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- b) Prepare tax receipts upon request for other non-cash contributions.
- c) Prepare IRS information returns for non-cash gifts over \$5,000.00 that are liquidated within two years of the receipt.

**HUMAN RESOURCES:**

Finance Committee  
Endowment Committee  
Audit Committee

**OTHER RESOURCES:**

Board/Program Council Working Materials Notebook  
UUA Congregational Handbook  
Long Range Planning Survey Data.