



**POSITION TITLE: FINANCE DIRECTOR**  
**Regular Full-time, Exempt**  
**DEPARTMENT: Finance Department**  
**EFFECTIVE: September 1, 2006**  
**REVISED: January 2025**

**GENERAL DESCRIPTION:**

The Finance Director is an exempt professional management position responsible for overseeing all financial operations within the Township, including accounts payable, payroll, accounts receivable, cash and investment management, financial reporting, and asset inventory. This role involves coordinating, administering, and supervising all accounting, budget preparation, administration, revenue collection, and fiscal reporting for the Township and its component units. The Finance Director also serves as the chief financial advisor to the Township Manager and plays a key role in strategic planning and long-term financial management.

**SUPERVISION RECEIVED:**

Works under the administrative direction of the Township Manager.

**SUPERVISION EXERCISED:**

Directly supervises the Finance Department staff. Also acts as liaison between the Township and the Real Estate Tax Collector, and the Act 511 Tax Collector.

**ESSENTIAL JOB FUNCTIONS:**

- **Financial Management:**
  - Administers, collects and prepares financial data for the development of the Township's annual operating and capital reserve budgets.
  - Oversees, develops and updates the Township's long-term financial plan, including financial analyses, predicting trends, and recommending forecasts to ensure future financial stability.
  - Administers, develops and implements policies and procedures for Department operations and the Township budgetary program.
  - Prepares monthly financial report summarizing the Township's financial position. Provides a budget presentation on a quarterly basis to the Board of Supervisors with regard to the Township's budget status.
  - Oversees all accounting and record-keeping systems; reviews general ledger accounts and computer reports; prepares new accounts in accordance with DCED standards.
  - Responsible for the accounting management of governmental, agency, and proprietary funds in accordance with all GASB Statements.
- **Budget and Audit:**
  - Calculate budget requirements and projections for revenue, personnel and operational needs; distribute core budget figures to departments and solicit budget requests; consolidate information from departments, perform technical review to analyze trends; recommend changes in revenue rates and expenditures; finalize budget format for public inspection, prepare, or direct preparation, of state and federal reports, and ordinances and resolutions; establish systems of internal controls and plan for and coordinate implementation.
  - Leads the audit review process, coordinating with auditors, and ensuring timely completion of annual audits. Proof final report; prepare annual and periodic reports on financial forecasts, surveys, and funding applications. Prepares



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necessary financial reports for state and federal agencies. Prepares financial statements in ACFR format in coordination with Township auditors.

- Prepare presentation for the public.
- **General Ledger and Financial Controls:**
  - Oversees the general ledger, including accounts receivable, accounts payable, fixed assets, utility billing, and cash management, ensuring accuracy and compliance with laws and regulations.
  - Establishes and maintains internal control procedures, ensuring that standard accounting practices are followed.
  - Manages fixed asset inventory and oversees related documentation and procedures. prepare inventory reports for departments; compile documentation, develop spreadsheets to evaluate data, recommend revisions to procedures to improve control of fixed assets.
- **Staff Supervision:**
  - Supervises, trains, develops, disciplines, and evaluates Finance Department personnel. Provides direction, feedback, and resolves issues to ensure efficient department operation.
- **Strategic Planning and Policy Development:**
  - Participates in strategic planning, financial forecasting, and developing long-term budget plans. Recommends changes in revenue rates and expenditures.
  - Provides financial advice to the Township Manager and other stakeholders, ensuring sound financial decision-making.
- **External Relations and Compliance:**
  - Acts as the primary financial representative in interactions with external entities, including actuaries, insurance representatives, consultants, and auditors.
  - Ensures compliance with federal, state, and local regulations concerning financial reporting and management.
  - Oversees financial management programs including, pensions, debt administration and compliance, cash management, banking, auditing, internal controls, and budgeting.
- **IT and System Management:**
  - Manages financial information technology (IT) functions in conjunction with third-party vendors. Administers financial software systems and coordinates with IT for system updates and improvements.
  - Administer financial software system and intersection of financial system software and utility billing operations; review and make recommendations for financial software and hardware improvements throughout the Township.
- **Other Duties:**
  - Handles confidential financial and personnel information securely and discreetly.
  - Assist Township Manager with collective bargaining agreement negotiations; prepare costing proposals, analyze data, recommend modifications to contract language.
  - Participates in relevant professional associations and ongoing training to remain current in the field.
  - Attends evening meetings as required and performs related duties as assigned by the Township Manager.
  - May perform the work or assignment of any employee assigned to the Finance Department, as needed.



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The above are intended to describe the general nature and level of work being performed in this position; they are not intended to be an exhaustive list of all duties, responsibilities, and qualifications of this position. Perform related duties and responsibilities as required.

**JOB STANDARDS:** (Minimum qualifications needed to perform essential functions):

- Governmental accounting principles and practices (GAAP and GASB), budgeting, auditing, purchasing, debt management, and contracting.
- Public finance, fiscal planning, and internal control procedures
- Accounting, payroll and accounts payable functions
- Budgetary accounting, auditing, and reporting systems
- Laws, regulations, and standards pertaining to financial and benefits management
- Information systems and computerized financial applications

**Ability to:**

- Communicate effectively both orally and in writing
- Prepare, read, and interpret complex financial reports
- Effectively utilize Microsoft Office, especially Excel, for report writing, spreadsheets, and database management
- Supervise and motivate staff effectively
- Establish and maintain effective working relationships with stakeholders
- Sit, reach at waist level, and perform fine manipulation frequently; walk, stand, and handle office implements occasionally.
- Possess visual acuity (near vision continuously).

**JOB LOCATION:** (Places where work is performed)

Montgomery Township Administration Building, 1001 Stump Road, Montgomeryville, PA 18936

**EQUIPMENT:** (Examples of machines, devices, tools, etc., used in job performance)

Computer system, telephone, facsimile, copier, calculator

**EDUCATION, EXPERIENCE AND TRAINING:**

- Bachelor's degree from an accredited university with major course work in public or business administration, finance, accounting or related field. Master's degree in public administration or related field, preferred.
- Minimum of five (5) years' supervisory experience in finance or accounting; including experience in and knowledge of municipal financial procedures, statements, software, GASB, payroll, and tax reporting.
- Proven knowledge of governmental fund accounting and proprietary fund accounting.
- Successful completion of pre-employment background checks, Credit report check, pre-employment physical, assessments or tests, as applicable, required.
- Ability to communicate and perform well in an interview and demonstrate proven skills and abilities, required.
- Remain current in all position applicable trainings as required.