

# **Township of Southgate**

## **JOB DESCRIPTION**

Date of Update: <b>January 2026</b>	<b>Finance Assistant</b>
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### **Section A: Position Description**

#### **1) Position Identification**

The purpose of this section is to determine your current position within the organization.

Job Title: <b>Finance Assistant</b>	Supervisor's Job Title: <b>Deputy Treasurer</b>
Standard hours of work per week: 35 hours per week	Eligibility to Group Insurance: Yes Eligibility to OMERS: Yes
Location of Position: Hopeville Administration Office	Department / Division: <b>Finance</b>
Employment Status: Permanent Full Time Salaried	Pay Band: <b>12</b>

#### **2) Scope of Position (A maximum of three sentences.)**

The Finance Assistant will complete account receivables functions including invoicing third party billings, preparing deposits, entering EFTs as well as reconciliations of accounts and banks.

This position will also support the property tax function of the municipality by answering inquiries via phone and email, processing payments including mortgage payments and PAPs, assisting with preparation of tax bills and other administrative functions to support the tax department.

This position is the first point of contact for the front counter/reception; answering phones, taking payments, and providing customer service.

<b>Key Responsibilities</b>	<b>Tasks</b>	<b>Percent of Time</b>
Customer Service	<ul style="list-style-type: none"> <li>- Provide customer service at the front counter as the first point of contact; answering phones, etc. including taking payments at front counter.</li> </ul>	35%
Accounts Receivable	<ul style="list-style-type: none"> <li>- Enter EFT receipts.</li> <li>- Prepare bank deposits.</li> <li>- Balance Account Receivable accounts.</li> <li>- Process all cash receipts.</li> <li>- Issue general receivable invoices including but not limited to waste department invoicing, rental agreements, recreation invoicing, miscellaneous services and agreements.</li> <li>- Issue follow-up notices and statements to include past due notices and collection of outstanding accounts.</li> <li>- Run interest on general receivable accounts.</li> </ul>	40%
Tax Support	<ul style="list-style-type: none"> <li>- Provide customer service by answering tax-related inquiries via phone, email and in person.</li> <li>- Process tax payments including mortgage payments and PAPs.</li> <li>- Assist with the preparation and distribution of tax bills.</li> <li>- Assist with the preparation and distribution of arrears notices and tax statements.</li> <li>- Assist with the maintenance of the tax rolls.</li> <li>-</li> </ul>	20%
Other	<ul style="list-style-type: none"> <li>- Provide backup support for booking Facilities.</li> <li>- Provide backup support for other finance roles.</li> <li>- Performs all other duties as assigned by Supervisor.</li> </ul>	5%

## Section B: Skills

## 1) Formal Education and External Training

<u>Highest level required</u>	<u>Specific Specialty or Degree? (List)</u>
<input type="checkbox"/> High School <input type="checkbox"/> Vocational School <input checked="" type="checkbox"/> Community College  <input type="checkbox"/> University Degree <input checked="" type="checkbox"/> Individual Courses	2 year Community College Diploma in Business Administration or equivalent work experience of 2 years is preferred.
<p>License or Professional Designation Certified Municipal Revenue Professional (CMRP) designation beneficial or working towards the CMRP designation an asset.</p> <p>Is it a requirement of your job to keep "up-to-date" by reading or taking courses / seminars?</p> <p><input checked="" type="checkbox"/> Yes      <input type="checkbox"/> No</p> <p>Discuss: May attend courses/seminars on an as-needed basis.</p>	

## 2) Required on the Job Training

<b>Specific Internal Training</b>	<b>Months to Complete</b>
• Keystone User Group Meetings/Training Courses.	As required
• Completion of Municipal Tax Administration Program	1-2 years
• Completion of the Certified Municipal Revenue Professional (CMRP) designation would be an asset	An asset

## 3) Work Experience

<b>Experience</b>	<b>Minimum Years Required</b>
• Computer experience	2 years
• Accounting experience	2 years
• Cash handling	2 years
• Dealing with the public	2 years
• Municipal finance	An asset

## 4) Other Key Skills:

• Good organizational skills
• Good communication and interpersonal skills
• Good computer and software application skills
• Good mathematical skills

## 5) Key Relationships (Contacts)

<b>Internal Contacts</b>	<b>Frequency</b>	<b>Purpose</b>	<b>Method</b>
Co-workers (my dept.)	Daily		
Co-workers (other dept.)	Daily		
Supervisor (my dept.)	Daily		
Supervisor (other dept.)	Frequently		
Dept. Head (my dept.)	Frequently		
Dept. Head (other dept.)	Occasionally		
CAO	Occasionally		
Council (your own)	Seldom		
<b>External Contacts</b>	<b>Frequency</b>	<b>Purpose</b>	<b>Method</b>
Ratepayers	Frequently		
General Public (Not residents)	Occasionally		
Children/Students	Seldom		
Seniors	Seldom		
Staff in other municipalities	Seldom		
Business representatives	Seldom		
Consultants, Engineers, Planners, etc.	Seldom		
Auditors	Annually		
Suppliers	Seldom		
Solicitors	Seldom		
Funding Organizations	Seldom		
Government Officials	Seldom		
Boards	Seldom		
Council (other municipalities)	Seldom		
Media	Seldom		
Ratepayers Groups	Seldom		
Software Support Tech.	Seldom		
<b>Interpersonal skills:</b>			
Extending common courtesy; handling complaints, working cooperatively; responding to basic needs or requests; identifying needs; advising			

## 6) Decision Making

Must use judgment and tact in dealing with complex problems relating to the day-to-day operations of the Municipality.

Must be empathetic, yet proactive when dealing with the public, employ human relation skills.

## 7) Problem Solving Responsibilities

Ability to analyze and evaluate operations, and develop and implement corrective action to resolve problems. Complex issues are escalated to the appropriate individual(s)

## 8) Equipment & Technology Utilized

Operating systems, Accounting software, Tax module, Microsoft products, Municipal Property Taxation software.

## **Section C: Responsibility**

### **1) Program Delivery**

Supports the delivery of administration and financial programs. Knowledge of applicable federal and provincial statutes and regulations related to tax billings.

### **2) Impact and Accountabilities**

Must maintain confidentiality where residents/ratepayers are concerned.

Must ensure accurate data entry as errors can result in incorrect invoicing to customers.

### **3) Supervision**

<b>Direct Subordinates – Job Titles</b>	<b>Number of Staff</b>
None.	
<b>Indirect Subordinates – Job Titles</b>	<b>Number of Staff</b>
None.	
<b>Provides training/instruction to others – Job Titles</b>	<b>Number of Staff</b>
None.	

### **4) Material and Information Resources**

Computers and other standard office equipment.

Confidential customer information.

### **5) Financial Resources**

Not directly responsible for expenditures of money; however, responsible for handling, balancing and accuracy of recorded collections.

Responsible for accurate accounting data entry and reporting.

## Section D: Working Conditions

### 1) Physical Environment

Rate the amount of each of the following working conditions that you are exposed to on the job from a scale of 1 to 5, where 1 represents no exposure, 3 represents some exposure and 5 represents continuous/regular exposure.

Condition	1	2	3	4	5
Sitting				X	
Standing		X			
Noise Exposure		X			
Adverse Temperature	X				
Pushing/Pulling	X				
Lifting/Carrying		X			
Dust	X				
Odors	X				
Other (Specify) Physical Aspects					

### 2) Health & Safety Hazards

Minimal hazards, office environment.

May encounter irate customers when providing customer support.

#### Health and Safety Responsibilities

Responsible to perform duties in a Health and Safety conscious manner.

### 3) Travel

N/A

### 4) Driving

Driving to seminars to occur occasionally.

### 5) Mental Environment

Busy office environment, open concept.

Constant interruptions, dealing with unhappy people (sometime ratepayers) and deadlines contribute to stress.

## **Section E: Effort**

### **1) Mental Effort**

Strong mental effort required for accuracy.  
Deadlines and task management are major components of work effort.  
Constant interruptions – public, residents, co-workers, telephone.

### **2) Physical Effort**

Minimal physical effort required.  
Excellent keyboarding skills. There will be long periods of data processing required.  
Prolonged periods of sitting.

## **Section F: Additional Information**

The Township of Southgate is an equal opportunity employer. Accommodations are available for all parts of the recruitment process. Applicants need to make their needs known in advance. This document can be made available in other accessible formats as soon as practicable and upon request.

## **Supervisor Comments**

I have reviewed this job description with the employee and make the following comments.

**Employee:** \_\_\_\_\_  
Signature

**Date Completed:** \_\_\_\_\_

**Supervisor:** \_\_\_\_\_  
Signature

**Date Completed:** \_\_\_\_\_

**CAO:** \_\_\_\_\_  
Signature

**Date Completed:** \_\_\_\_\_