

# **Position Title and Department**

Support Representative, Finance

## Purpose

To coordinate, process, and manage financial transactions on behalf of the Company so as to support and maintain the Company's favourable financial position and reputation. To diligently, proactively, and prudently maintain detailed financial records while meeting or exceeding the Company's service standards. To generate and compile data, results, and reports so as to provide business insights and intelligence in order to support the Company's initiatives.

## Relationships

Report to: Vice President, Finance Direct Reports: None

- Responsibilities

  - Coordinate and process all payroll transactions on behalf of the Company
    Generate, compile and distribute data, results, and reports, as needed
    Facilitate the Company's month-end and year-end procedures
    Coordinate and administer the Company's accounts receivable policies and procedures
    Review, process, and record payments received from the Company's insurance company partners
    Scrutinize, process, coordinate a, and record all payables to the Company's insurance company partners
    Escalate payables for management approval as needed
    Act as a liaison for vendors and other partners of the Company with respect to financial transactions, such as:

    o Insurance company reconciliation(s)

    o Financial institution charges and/or services
  - - o Financial institution charges and/or services

    - Bad debt collections
       Any other financial transactions
  - Process and record all trust account transactions in compliance with industry regulations and Company standards Scrutinize and process insurance premium billings and/or invoicing, as needed Maintain a high degree of privacy and confidentiality

  - Prepare for, attend, and participate in meetings, as needed Provide back-up for team members as needed Provide administrative support for the Company as needed

  - Give due consideration to participating in the Company's internal committees

    Actively and continuously research and pursue educational and professional development opportunities

    Seek opportunities to support co-workers in their own pursuit of educational and professional development
  - Execute the responsibilities of the position in a courteous and professional manner, consistent with the Company's values, so as to enhance the Company's reputation

## Skills/Competencies

- Strong communication skills across multiple media Strong organizational skills
- Strong problem solving ability Ability to manage timelines High sense of urgency
- High attention to detail
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- High school diploma or equivalent