

Hillcrest Property Owners, Ltd
Job Description for Secretary/Treasurer and Finance Officer (1/2021)

NOTE: As per the Hillcrest POA board meeting on 11/23/20, the secretary and treasurer are currently a combined position for the association. To assist with the day to day business, the board utilizes a non-board member for book-keeping who will be compensated \$50/month for this work.

Secretary/Treasurer:

Record minutes of the Property Owners Annual Meeting. Prepare minutes of this meeting and have minutes approved by the Board of Directors as soon as possible.

Record minutes of any and all Board of Director meetings or special meetings. Prepare minutes to be approved by the Board of Directors.

Prepare information for the annual homeowners meeting with a copy of the previous years' minutes, financial data and list of expiring board members and possible new board candidates.

Help organize the POA Annual Meeting, along with other volunteers from the Board of Directors or other committee members.

Review and provide oversight to the association bookkeeper. Conduct annual review of the association accounts.

Be assigned to the association joint bank account along with bookkeeper.

Together with the Board of Directors, create the annual budget for the coming year.

Prepare financial and income and expense statements periodically for the Board of Directors and for the Annual Meeting. Present the financials to the homeowners at the annual meeting, answering any questions the homeowners may have.

Finance Officer:

The Finance Officer is a non-POA board position and will be given quarterly stipend of \$50/month to manage the books and finances on the associations behalf. Since they are receiving compensation, they can-not be a member of the board.

Prepare annual POA dues statements. Verify homeowner does not owe previous years' dues, and, if so, adjust the annual dues statement requesting prior years dues in addition to current year. Mail statements to homeowners.

Receive dues payments and record payment for each property owner. Prepare deposits to be made to the POA bank account.

Receive monthly bank statement and verify balances of the checking and savings accounts. File bank statements for permanent records.

Pay any invoices that are approved by the Board of Directors in the annual budget. Invoices should be noted as "PAID" with the check number indicated on the invoice. Communicate with vendors, as necessary.

Prepare "Homeowners/Owners Association Status Request" form from Realtors and/or Title Companies requesting information about individual properties when property is being sold or transferred. This information must be completed in a timely manner. Requests are provided by email and must be returned via email due to strict time constraints.

Answer requests/questions from homeowners or refer requests to the appropriate committee member.