



Treasurer Role Description

Role Summary

The Treasurer is an officer of the Board of Directors and serves as the Board's lead on financial oversight, fiduciary responsibility, and governance. The Treasurer ensures that appropriate financial policies, controls, and reporting structures are in place to support UIDN's mission while maintaining clear separation between Board oversight and day-to-day financial operations.

UIDN has an active, working board, and the Treasurer collaborates closely with the Executive Director and external financial professionals; however, the Treasurer's primary role is **oversight and governance**, not routine financial execution.

Key Responsibilities

Board-Level Financial Oversight

- Serves as the Board's primary officer responsible for financial governance and fiduciary oversight.
- Presents quarterly financial summaries and insights to the Board of Directors.
- Reviews monthly financial statements (including P&L and cash flow reports) prepared by the bookkeeping function, focusing on trends, risks, and budget alignment.
- Advises the Board on financial health, sustainability, and material financial risks.

Financial Policies and Internal Controls

- Oversees the adequacy of UIDN's financial policies, procedures, and internal controls.
- Reviews and recommends policies related to financial management (e.g., check signing authority, banking controls) for Board approval.
- Ensures appropriate separation of duties and responsible financial safeguards are maintained.

Budgeting and Financial Planning

- Collaborates with the Executive Director and Development Director on the development and periodic review of the annual budget.
- Reviews budget-to-actual performance and elevates significant variances or concerns to the Board.
- Provides strategic input on financial planning in support of UIDN's programs and growth.

Compliance and External Reporting

- Oversees compliance with required financial and regulatory filings, including IRS Form 990 and New York State CHAR500, in coordination with UIDN's CPA and staff.

- Reviews significant compliance issues related to payroll, taxes, or regulatory matters, as needed.
- Ensures appropriate processes are in place for timely payment of organizational obligations without managing routine accounts payable activities.

Audit and External Advisor Oversight

- Oversees and supports the annual independent financial review or audit.
- Serves as the Board liaison to UIDN's CPA and external auditors.
- Reviews year-end financial statements and audit findings and reports key outcomes to the Board.

Qualifications

- Strong financial literacy; background in accounting, finance, or business management preferred.
- Experience with nonprofit financial management, reporting, or board governance.
- Ability to interpret financial information and communicate clearly with non-financial board members.
- Bachelor's degree in accounting, finance, or business administration preferred but not required.

Please email us at uidn@ulsterimmigrantdefensenetwork.org if you are interested