

## CITY OF HAMILTON

### CORPORATE SERVICES DEPARTMENT

(FINANCIAL SERVICES, TAXATION & CORPORATE CONTROLLER DIVISION – LOCATION – 71 MAIN ST. W.)

### TAXATION FINANCIAL ASSISTANT – CUPE 5167

#### SUMMARY OF DUTIES

Reporting to the Manager, Taxation, this position performs a variety of accounting, budget, statistical and reporting functions related to Taxation.

#### GENERAL DUTIES

Maintain, examine, analyze, reconcile and assist with reports on current and balance sheet accounts by:

- Input and retrieve financial data in a computerized accounting system; including preparing journals, inputting data, balancing, initiating and processing computerized general ledger transactions;
- Maintain record of vendor invoices to ensure adequate funds in Purchase Orders;
- Assist in the preparation and co-ordination of monthly expenditure/revenue budget exception variance analysis and reports;
- Assist in the year-end process by monitoring and analyzing accounts and by assisting in year-end budget variance reporting;
- Prepare and reconcile monthly/quarterly school board and BIA levy reports for management review and distribution;
- Monitor various operating and balance sheet accounts and ensure timely completion of Account Reconciliations;
- Monitor the City's bank account for Taxation related items and initiate appropriate action required by appropriate Taxation staff.

Reconcile accounts and monitor accounts for errors; prepare and enter correcting journals.

Track and maintain statistics on charges added to the tax roll, monthly penalty and interest, returned payments, property tax arrears, reminder notices and various revenue accounts.

Develop and edit computerized actuals to budget spreadsheet and other financial and statistical reports for Manager to enhance decision making and reporting.

Monitor and investigate balances on City of Hamilton and Provincial properties, initiate action required by appropriate Taxation staff.

Proactively monitor and investigate tax roll accounts in property tax arrears based on pre-set criteria (number of years in arrears, returned mail, no payments, etc.) taking appropriate action to facilitate clearing of arrears.

Review and understand the various school board and BIA levies. Complete required adjustments to ensure up to date and accurate reporting and remittance.

Receive and answer inquiries from staff, the public, other City departments, Council members, government agencies and outside agencies as required.

Assist the Tax Registration Officer in monitoring Extension Agreements to ensure compliance.

Assist in the Tax Sale process.

Develop and maintain job related policies and procedures.

Compose correspondence to other City departments, internal staff, government agencies and outside agencies as required.

Assist in the preparation of staff reports by compiling and analysing financial data and trends.

Participate in special projects as required.

Provide support to the Manager and Taxation Administrators as required.

Work in accordance with the provisions of applicable Health and Safety legislation and all City of Hamilton corporate and departmental policies and procedures related to Occupational Health and Safety.

Perform other duties as assigned which are directly related to the major responsibilities of the job.

**QUALIFICATIONS**

1. Demonstrated knowledge of accounting, budget and related financial reporting requirements typically acquired by the completion of a business and/or accounting Community College diploma or equivalent specialized related business/accounting courses up to two academic years and/or a combination of equivalent education and related work experience.
2. Progressive accounting experience demonstrating competency in analysis and understanding of financial statements, budgets and reports.
3. Demonstrated ability to communicate both orally and in written form with varying audiences.
4. Must be detail oriented and have analytical, organizational and time management skills.
5. Must have a detailed and advanced knowledge of and experience with Excel, sufficient to develop and analyze complex financial reports using Excel functionality such as formulas and linking.
6. Demonstrated knowledge and experience with Vailtech and PeopleSoft would be an asset.

**THE INCUMBENT SHALL COMPLY WITH ALL HEALTH AND SAFETY POLICIES AND PRACTICES FOR THIS POSITION AND THE WORKPLACE.**

\*\*\*\*\*