

Full Time Assistant Treasurer/Gift Processing Lead

Consolidated Catholic Administrative Services - Roswell, GA



REGNUM
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Consolidated Catholic Administrative Services based in Roswell, GA, an established Catholic nonprofit administrative services organization serving Catholic apostolates nationwide through the Catholic Church's New Evangelization mission, is seeking an energetic, flexible, and proficient full-time assistant treasurer/lead gift processor to assist the treasurer. CCAS handles cash management and gift processing for the Legionaries of Christ in the North American territory which operates across approximately nineteen corporate entities and sixty-five bank accounts. The role assists the treasurer with cash management, card management, and gift processing. It supports the banking relationship for these corporate entities and serves almost thirty clients. It assists them with bank transfers, making payments, debit cards, purchasing cards, and fraud detection and management. It also oversees the processing of donations received, particularly for the Legion of Christ national development office.

Key Responsibilities:

Assistant Treasurer

1. Assists with the management of the banking relationships for the Legion entities and clients that select the service. Assists with the following duties: fostering relationships with the bank's management and our clients, conducting RFPs for changing banks as necessary, opening and closing bank accounts, maintaining an up-to-date bank account database (maintaining signers on the accounts, mailing addresses, etc.) managing banking fees, managing debit and credit cards, and selecting and managing merchant accounts in collaboration with the Constituent Relationship Management (CRM) system team.
2. Assists with online payments and transfers: Assists with entering wire and transfer transactions as requested by the affiliated entities or national offices.
3. Funding bank accounts for the various entities as needed and producing financial/cash management reports on a regular basis
4. Assists with the management of the Legionary communities' shared deposit account by handling requests for money (provisions) from the central account by the different communities and recording of donations processed through Gift Processing in the CRM.
5. Assists with ensuring corporate credit and purchase cards are used in agreement with the corporate policies notifying the treasurer if the credit or purchase cards are used improperly.
6. Assists fiduciary in the reception of planned gifts through annuities, trusts, estate gifts, etc.

7. Assists with accounts payable in coordination with the accounting team: uploads the applicable data to the banking system for check payments and electronic payments provided by accounting and approved by the treasurer.

Gift Processing Lead

The Gift Processing Lead is responsible for ensuring that all donations and gifts are processed accurately and efficiently. This role involves managing a team, maintaining data integrity, and ensuring donor satisfaction.

8. Manages gift-processing: processes gifts in a timely and effective manner which includes registering the gifts in the CRM, depositing gifts in the bank, proper documentation of the gifts received for Legion of Christ CT, and its affiliates, and recording restricted donations.
9. Gift Processing: Oversees the daily activities of gift processing, including mail processing, gift entry into the database, and receipt production.
10. Data Integrity: Ensures the accuracy and integrity of all gift-related information stored in the CRM. Includes updating donor payment information as required.
11. Donor Intentions: Collaborates with the development officers to ensure that gifts are registered according to the donors' intentions, including requesting written expression of any restriction.
12. System Management: Assists with the implementation of new systems, system upgrades, and data enhancements.
13. Benchmarking: Applies applicable laws, regulations, and procedures to all facets of gift processing and reporting.
14. Team Leadership: Supervises and supports the gift processing team, ensuring they meet organizational goals and standards.

Desired Skills and Characteristics:

- **Technical Proficiency** Working knowledge of Microsoft Suite, especially Excel, merchant account processing platforms (iATS, Stripe/Cognito Forms, Acceptiva, QGIV, Bloomerang, etc.) and CRM databases, Salesforce experience preferred
- **Communication Skills:** Excellent verbal and written communication skills. Ability to read/write both English and Spanish proficiently
- **Attention to Detail:** High degree of accuracy in data entry and processing.
- **Organizational Skills:** Strong organizational and time management skills.
- **Problem-Solving:** Ability to identify inefficient processes and implement improvements.
- **Team Player:** Ability to work well with others and support team members including in a matrix environment.
- **Ongoing education:** regularly engages in professional development and certifications to increase knowledge and capability in the field.
- Respectful and open to the teachings of the Catholic Faith. Practicing the Catholic Faith.

- Open to and very supportive of the mission of the Legionaries of Christ and the Regnum Christi Movement.
- Values to exhibit: Communion, Collaboration, Mutual Trust/Respect, Accountability, Subsidiarity, Team Player, Humble Service

Education and Experience:

- **Education:** Bachelor's degree in finance, accounting, or relevant field
- **Experience:** A minimum of one to two years of experience in treasury, gift processing or a relevant financial role, including supervisory responsibilities.

Benefits: Generous paid time-off: holidays, vacation, personal and sick time, full employee and family healthcare coverage, and excellent 401(k) retirement savings benefits.

Position is 100% on site.

Regnum Christi is an organization full of great people working to achieve the Catholic Church's modern evangelizing mission. If you are interested in joining our team, apply [here](#).

Application must include: (a) a meaningful cover letter; (b) wage expectations; and (c) resume.