

Hartford Society of Financial Analysts Job Description

Treasurer

General Purpose:

- Supervise financial affairs of the Society, representing the best interests of the membership with the responsible application of funds in keeping with the goals and objectives established by the board of directors.

Major Functions:

- Ensure that the HSFA Society Board of Directors is kept informed on financial conditions of the Society at monthly board meetings.
- Maintain Society checking account, issue checks for bills, expenses, etc.
- Report on the financial status of the Society at the annual meeting.
- Maintain and file all financial forms and tax related returns.
- Submit Flexible Spending Plan with CFA Institute.

Time Commitment:

- On average, five hours per month.

Key events and Dates:

Key events	Date	Details
Income Tax Filing	November 15	Short Form 990 EZ filled out based on previous fiscal year income and spending.
CFA Institute Flexible Spending Plan	November 15	CFA Institute allows for flexible spending of available resources providing spending plan is submitted in November.
Annual Spending Report	June	Provide summary of annual spending and fee income for fiscal year.