

Financial Secretary

Result Expected

An effective financial secretary will receive, record, and deposit all funds received by the congregation in a timely, thorough, and confidential manner. The financial secretary works with the treasurer and committee on finance to develop policies and procedures so that funds can be made available to support the ministry of the congregation.

Spiritual Gifts and Qualifications Helpful for the Job

- This leader benefits from having one or more of these spiritual gifts: administration, helping, giving, and faith.
- Useful skills and experience for this position are skills and interest in financial record keeping; ability to keep detailed, accurate records and maintain appropriate confidentiality; passion for financially supporting the mission of making Christian disciples for the transformation of the world; ability to work with individuals and ministry teams.
- This leader needs skill in searching for new revenue sources along with an understanding of biblical stewardship and management of all resources that God provides.
- The financial secretary and treasurer roles should be held by two people who are not immediate family members.
- The congregation's committee on nominations and leader development may establish specific standards for this position.

Responsibilities of the Position

- The financial secretary works according to the guidelines established by the committee on finance to receive funds from whatever source (including through the mail and by electronic deposit), record them, and report them to the church treasurer and to the committee on finance or, in some cases, the trustees.
- The financial secretary arranges for collecting offerings received during worship services and other church gatherings at the conclusion of these events, making certain that more than one person is involved in collecting and counting the money.
- This leader collaborates with the finance committee to establish procedures for collecting and recording all money received through the regular offering, through the mail, and by electronic deposit. Designated gifts and bequests are managed by the trustees in accordance with *The Book of Discipline*.
- The financial secretary deposits cash and checks in a bank as soon as possible after they are received.
- The financial secretary keeps records, whenever possible, of how much money is given by whom and reports amounts received to the appropriate people.
- The financial secretary checks the records quarterly against those of the treasurer.
- The financial secretary helps ensure that the financial records are in good order for an annual audit. The financial statement is reported regularly to the committee on finance.
- The financial secretary should engage in spiritual practices to build attentiveness to God's will and

- direction. Financial management and attentiveness to daily administration can detract a leader's attention from the mission of the church to make disciples of Jesus Christ for the transformation of the world.
- The financial secretary is accountable to the charge conference through the church council.

Getting Started

1. Talk with your pastor and others to understand their hopes and dreams for the congregation and ways your financial leadership will advance the vision for ministry.
2. Set aside time for prayer. Express your concerns, joys, and observations to God, and listen for God's direction for your leadership. Ask God for direction about wise management of the congregation's financial resources. Ask God to increase the understanding you and your congregation have for the role of stewardship in forming Christian disciples.
3. Work closely with the treasurer and chair of the finance committee to keep abreast of the changes in financial processes (institutional regulations as well as cultural changes, such as the trend toward electronic money management).
4. Evaluate the record keeping processes of your congregation. What is working well? What can be improved?
5. Study [*Guidelines for Leading Your Congregation, 2017-2020: Finance*](#).
6. Participate in training experiences. Banks and schools may offer courses to update your skills and teach new processes.

People and Agencies That Can Help

- Your pastor and people in your congregation and community.
- Ken Sloane, ksloane@UMCdiscipleship.org, Discipleship Ministries, P.O. Box 340003, Nashville, TN 37203-0003; (877) 899-2780; <http://www.umcdiscipleship.org/leadership-resources/stewardship>.
- Don Joiner, djoiner@UMCdiscipleship.org, Discipleship Ministries, P.O. Box 340003, Nashville, TN 37203-0003; (877) 899-2780; www.umcdiscipleship.org.
- InfoServ, the information service for the church, provides current information about United Methodist resources, programs, and staff services. Email: infoserv@umcom.org; Website: infoserv.umc.org.

Web and Print Resources

- [*Afire with God: Becoming Spirited Stewards*](#) by Betsy Schwartztraub (Nashville: Discipleship Resources, 2007)
- [*The Book of Discipline of The United Methodist Church, 2016*](#) (Nashville: The United Methodist Publishing House, 2016)
- [*Celebrating the Offering*](#) by Melvin Amerson and James Amerson (Nashville: Discipleship Resources, 2007)
- [*Committed to Christ: Six Steps to a Generous Life*](#) (Abingdon Press, 2012) by Bob Crossman
- [*Creative Giving: Understanding Planned Giving and Endowments in Church*](#) by Michael Reeves, Rob Farley, and Sanford Coon (Nashville: Discipleship Resources, 2015)
- Ecumenical Stewardship Center, <https://www.stewardshipresources.org>
- [*Electronic Giving*](#)
- [*Enough: Discovering Joy Through Simplicity and Generosity*](#) by Adam Hamilton (Abingdon Press, 2009)