



Municipality of West Elgin  
Job Description

**Title:** Financial Analyst/Tax Collector

**General Supervisor:** Manager of Corporate Services (Treasurer)

**Department:** Corporate Services

**Positions Supervised:** 0

### **Position Summary**

Reporting to the Manager of Corporate Services (Treasurer) the Financial Analyst/Tax Collector is responsible for the processing of all property tax billings and adjustments for the Municipality. This includes entering data, producing bills, receiving payments, maintaining records and ledgers, answering questions from the public and staff and following up with overdue accounts. This position also performs various bank and general ledger reconciliation, liaises with regulatory agencies and auditors. This position is responsible for the implementation and maintenance of the Asset Management Plan, including asset inspection/condition assessments, asset performance monitoring, life cycle analysis and forecasts and operations and maintenance standards development for all municipal assets.

### **Principal Responsibilities**

- Responsible for all property tax processing and functions, including:
  - Maintaining customer database, tax rates and billing codes within accounting software
  - Enters all property tax data into the computer system including property changes, local improvement charges, etc.
  - Prepares tax certificates
  - Deals with problems, questions and concerns regarding tax payments, attempting to resolve issues and referring to Treasurer where this is not possible
  - Updates and maintains property files, computer records, assessment rolls, local improvement listings, updates debenture listings and all related material
  - Prepares tax notices, ensuring all regular and special tax rates, supplementary taxes, school support changes, rebates, conveyances, assessment appeals, tax arrears etc. are properly processed
  - Applies late payment charges
  - Produces monthly arrears statements
  - Coordinates and maintains PAP with customers, calculates monthly withdrawals, and submits monthly reports to the bank. Processes annual letters updating monthly withdrawal amounts
  - Follow-up on delinquent accounts/arrears; works with customers to arrange payment schedules
  - Prepares information on severely delinquent customers for Treasurer
  - Reconciles subledger to general ledger monthly and identifies action items
  - Prepares uncollectible write-off reports and small balance write-off reports
  - Updates mortgage company list and forwards bills to appropriate company
  - Communicates with MPAC on an ongoing basis regarding assessment values, rebates and severance completions
  - Tracks building permits to ensure new assessment values are added to properties

- Tracks severances to ensure apportionment are completed, new property files and Keystone accounts are created
- Prepares reports and working papers for the municipal audits as requested by the Treasurer and/or auditor
- Balances general and property tax subledgers to their corresponding general ledger accounts and make any necessary journal entries
- Provides support and back up to Treasurer in preparation of budgets and acquisition of funds
- Provides back up to other Finance staff including:
  - Processing of electronic payments, accounts receivable posting, bank deposit
  - Payment collection including issuing of cash receipts
  - Answering of public phone or counter inquires on a wide range of topics
- Participates in various meetings, seminars and workshops as necessary
- Provide input in preparation of the Operating and Capital budget process
- Produce or assist with the development and analysis of financial reports
- Assist in the development and implementation of the Asset Management Plan, revisions, policies and procedures in accordance with Provincial policies and deadlines.
- Create asset management processes and policies, for gathering information and keeping asset management inventory and databases up to date
- Maintain the asset inventory and database (CityWide) to support asset management planning and forecasting
- Other duties as assigned

### **Minimum Qualifications**

- Post Secondary diploma in accounting discipline
- Minimum of 3 years of experience in Municipal Finance with municipal budgeting and taxation experience.
- Working knowledge of accounting and taxation software packages and applications;
- Ability to work independently, with little direction;
- Exceptional organizational skills;
- Ability to multi-task;
- Ability to work well with other staff and public;

### **Other Skills**

- Strong interpersonal skills
- Strong written and oral communication skills
- Strong knowledge of relevant legislation, policies and regulations
- Computer skills – Keystone and Excel
- Experience in data collection, entry and reporting
- Attention to detail

**Approved by:** CAO/Treasurer

**Effective Date:** October 08, 2024