



Position Description

Assistant Treasurer

The Assistant Treasurer supports the Treasurer in managing the financial affairs of PTSA, ensuring accurate record-keeping, compliance with financial policies, and transparency in reporting. This role works collaboratively with the Treasurer, Board, and Administrator to maintain the financial health of the organization and may assume the Treasurer's responsibilities in their absence. As a member of the PTSA Board, the Assistant Treasurer ensures that financial efforts are aligned with PTSA's overall mission and operational priorities.

This position is designed as a succession role, with the goal of preparing the Assistant Treasurer to transition into the Treasurer position. It offers an opportunity to gain hands-on experience while contributing to the long-term sustainability of PTSA.

Key Responsibilities

Financial Support

- Assists with the preparation of financial reports, budgets, and forecasts.
- Helps monitor income, expenses, and bank reconciliations.
- Supports the Treasurer in maintaining accurate and up-to-date financial records, and preparing month- and year-end financial statements in collaboration with the Society's bookkeeper.
- May act as a signing officer ensuring all expenses are paid in a timely manner, according to PTSA policies.

Collaboration & Leadership

- Assist with the preparation for audits.
- Co-chair finance related working groups and committees as needed to achieve operational excellence.
- Be prepared to step in and fulfill the Treasurer's duties if needed.

Governance & Accountability

- Attend and actively participate in board meetings and the Annual General Meeting.
- Report on the state of the Society's finances and progress on assigned initiatives to the board.
- Contribute to the development and approval of the annual budget and ensure expenditures align with strategic and operational priorities.

- Assist in policy development and governance of the Society.

Qualifications

- Full Pharmacy Technician Member
- Experience or interest in financial management or budget planning.
- Strong attention to detail and organizational skills.
- Familiarity with digital tools for communication and document sharing (e.g. Google Workspace, Zoom).

Time Commitment Expectations

- Attend regular virtual board meetings: 2 hours/bi-monthly
- Lead committee work: 2-4 hours/month
- Review email and documents: 1-2 hours/month (includes policy drafts, minutes, etc.)
- Participate in strategic planning/board development: 6 hour in-person meeting 1-2 times per year
- Attend the annual general meeting (AGM) in-person: 2 hours
- Complete orientation/onboarding: 3-4 hours at start of term
- Participate in events such as the annual conference: optional but encouraged

Total Monthly average = 6 – 10 hours

- Additional time may be required during budget planning, year-end reporting, or audit preparation.