



Oakview Estates HOA Treasurer

Ongoing Duties

- Update the statement address book.
- Generate and mail out statements.
- Receive and document collections through mail, Venmo, and in-person drop-offs using Quicken.
- Pay, record and reconcile expenses with the bank account monthly using Microsoft Excel.
- Prepare financial summaries for the board and neighborhood meetings.
- Prepare the annual budget for the upcoming year in the fall.
- Coordinate preparation of federal and state tax returns for the HOA.

Community Leadership and Ethical Conduct

- Familiarize Yourself with the HOA Bylaws.
- Serve as a steward of the neighborhood by promoting a sense of community and cooperation among residents.
- Encourage resident involvement in HOA activities and decision-making processes.
- Ensure that the HOA's actions align with its governing documents and the principles of fairness, transparency, and community welfare.

Support

- Monitor expenses to ensure they align with the annual budget.
- Attend quarterly board meetings as needed.
- Vote as one of four sitting board members on the actions and decisions of the HOA.
- Provide support to other board members and committees as needed.
- Keep a record of all financial transactions and tax returns.

Qualifications

- Strong financial management skills.
- Computer with Excel and the ability to run Quicken.