



Township of East Zorra-Tavistock

Job Description

Financial Services Coordinator

(Tax Collector & TCA)

1. Position Title:

Financial Services Coordinator

2. Date Approved/Revisions:

August 2026

3. Pay Grid:

Grade 10 – Based on 35 Hours per Week, Full Benefits, OMERS

4. Reporting Relationships:

Reports to:

- Deputy Treasurer

5. Purpose:

Responsible for the Township's tax billing and collecting processes, co-ordination, and monitoring of all Township tax revenue through the Township's Accounts Receivable and Cash Management system. Assist the Deputy Treasurer with regards to accounting functions, corporate revenues, in implementing and administering objectives, and policies of programs in accordance with Council directives as it relates to all taxation functions, and as required by the Municipal Act or other applicable legislation for the Treasury Department. Assists Deputy Treasurer with all Tangible Capital Assets (TCA) and other accounting functions.

6. Scope of Position:

- Work is varied and often in response to Council decisions in addition to the ongoing operations of the Township
- All work is performed according to Township policy or is rooted in legislation -

the incumbent is expected to organize workflow and work independent of close supervision

7. Responsibilities:

a. Customer Service

- Co-responsible for front counter and phone services, including receipting of all payments.
- Accepts applications, assists with completing the required documentation courteously and promptly
- Refers calls and visitors to the appropriate source of information
- Provides general information about the Township, County and Provincial programs, provides literature of the subject and/or suggests alternative information sources

b. Property Taxation

- Responsible for all elements of the property taxation function
- Prepares the Township's property tax billing, including local improvements, special charges, debentures
- Maintains accounting and related records for all taxation transactions in the Township, including new and supplementary assessment; tax adjustments and write-offs and ensuring accuracy of same
- Works in conjunction with the Accounts Receivable Clerk to administer the municipal tax collection function, minimizing tax arrears and errors, ensuring collection of interest and penalties and diligently follow tax sale procedure as prescribed in the Municipal Act
- Reconcile taxes sub-ledger with general ledger on a monthly basis
- Manages the pre-authorized payment plans for taxes, as well as payments made by mortgage companies
- Prepares tax verifications and tax certificates and maintains accurate records of ownership, address, and mortgage changes
- Deals, on a daily basis, with taxpayers to address their problems, concerns, and inquiries
- Maintains property information details and records in the iCity Property Tax System.
- Prepares property ownership lists and records for a variety of notices and other purposes

- Maintains appropriate confidentiality with regards to property tax accounts
- Maintains accurate and consistent Laserfiche Finance filing records
- Ensures accurate information displayed in the Finance section of the municipal website.

c. Tangible Capital Assets (TCA)/Asset Management

Assists in assembling and maintaining the inventory databases of municipally owned assets in compliance with PSAB 3150. Work shall include, but not be limited to;

- Records and verifies all new Capital Asset records on a monthly basis
- Reviews new Township assets with department heads to acknowledge any disposals or specifics of newly acquired assets
- Assists in updating the tangible capital asset inventories on an annual basis.
- Assists in the annual financial evaluations and recording of assets including additions, betterments, and amortization.

d. Other

- Supports the Deputy Treasurer and CAO/Treasurer in operating budget preparation, providing taxation assessment information required to develop the budget
- Provides back up for front counter customer service, answering phones and receipting of all payments when needed.
- Other duties as assigned and consistent with the responsibilities set out in this job description.

8. **Working Conditions:**

- Work is subject to shifting priorities
- Work is performed in partial view of the public
- Some risk due to stress and verbal abuse when dealing with irate ratepayers who will not or cannot accept Township by-laws and regulations or who deny tax delinquency
- Certain sense of urgency due to public service

9. Hours of Work:

- Thirty-five (35) Hours per Week
- Normal hours are 8:30 a.m. to 4:30 p.m. Monday to Friday.
- Attendance at occasional meetings outside of the normal working day may be required

10. Working Relationships:

- With CAO - Receives direction and guidance for non-routine and special assignments
- With Deputy Treasurer – receives overall direction and supervision of day to day activities, workload management, general supervision
- With other Staff - Provides taxation information as required with regards to planning or building inquiries, exercises courtesy and co-operation for harmonious working relationships
- With the Public - Provides information and assistance; receives payments and application forms, maintains a high level of tact and courtesy

11. Knowledge and Skills:

- Reasonable understanding of the municipal finance related legislation, regulations including the Municipal Act and Assessment Act
- Knowledge of Vadim iCity Software and Taxation billing system is considered an asset
- Strong knowledge of Microsoft Windows and Office software systems
- Ability to work effectively with members of Council, staff, and public
- Excellent analytical skills and ability to manage conflicting priorities
- Excellent oral and written communication skills with an emphasis on customer service
- High level of initiative and independent judgement and ability to work as a key team member with minimal supervision, in a confidential environment

12. Formal Education:

- Post-secondary education in accounting or business.
- Completion of the Municipal Tax Administration Program (MTAP) through Ontario Municipal Tax and Revenue Association (OMTRA) is required, or

willingness to obtain within the first year.

- Certified Municipal Revenue Professional (CMRP) is considered an asset.

13. Impact of Errors:

- Errors in giving information to the public could lead to inadvertent misleading of the public, poor public relations and embarrassment to staff, self, and Council
- Accounting errors could result in costly duplication of effort to correct, could result in incorrect financial statements being produced.
- Clerical errors could be traced and corrected after costly duplication of effort and annoyance

14. Licences and Certifications

- Must hold a valid Class “G” Drivers Licence.

15. Health & Safety

- Works safely and in conformity with the Township Health & Safety Policies, Procedures and Guidelines. Uses protective equipment as directed. Participates in Health & Safety training and education exercises.