

### ROLE PURPOSE

The Part-Time Renewals and Finance Coordinator protects and drives the organization's recurring revenue by owning customer renewals and supporting accurate, timely financial operations. This critical role ensures renewals are executed professionally, billing is timely, and financial records are clean and reliable, supporting strong cash flow, operational predictability, and a positive customer experience across our subscription-based business.

### KEY RESPONSIBILITIES

#### Customer Renewals

- Manage end-to-end customer renewals, ensuring accuracy, timeliness, and thoroughness.
- Work with Sales, Customer Operations, and Finance to gather and confirm renewal details.
- Prepare and send renewal quotes, agreements, or other supporting documentation.
- Serve as the primary point of contact for customers throughout the renewal process, including navigating questions or concerns related to pricing changes with professionalism and care.
- Track renewal timelines and delinquent accounts in HubSpot, following defined re-engagement processes.
- Flag upsell opportunities or complex scenarios to the Sales team for follow-up.
- Provide renewal metrics and insights to leadership to support forecasting and retention.

#### Accounts Payable, Receivable & Payroll Support

- Process invoices, expense claims, and basic journal entries under the guidance of the Finance Manager.
- Support accounts receivable by tracking payments, following up on overdue accounts, and maintaining accurate records.
- Assist with payroll preparation, including commissions, time-off tracking, and payroll-related documentation.
- Maintain organized, accurate financial records to support timely processing and review.

#### Reconciliations, Recordkeeping & Compliance Support

- Perform routine reconciliations (e.g., bank, credit card, balance sheet accounts).
- Maintain organized accounting records in alignment with internal controls and accounting standards.
- Prepare and file GST/PST returns and support other recurring compliance filings.
- Assist with month-end and year-end preparation by organizing documentation and completing assigned tasks.

## KEY RESPONSIBILITIES

### Financial Reporting & Systems Support

- Prepare basic financial reports, summaries, and dashboards for internal use.
- Support budgeting and forecasting activities by compiling data and tracking variances.
- Maintain accurate subscription, contract, and customer financial data across accounting and CRM systems.
- Support data quality and alignment between accounting tools and HubSpot.

### Process Improvement & Operational Finance Support

- Identify opportunities to improve efficiency, accuracy, and scalability in finance workflows.
- Document and maintain accounting processes, templates, and controls.
- Support the Finance Manager with special projects, system improvements, or ad hoc analysis as needed.

## SKILLS & EXPERIENCE

### Education

- Diploma or bachelor's degree in accounting, bookkeeping, business administration, or a related field.
- Equivalent combination of education and relevant professional experience will be considered.
- Coursework or training in accounting, payroll, or financial administration is strongly preferred.

### Experience

#### Experience – Must Have:

- 3+ years of experience in an accounting assistant, bookkeeping, or finance support role.
- Hands-on experience with day-to-day accounting tasks such as accounts payable/receivable, expense processing, reconciliations, and recordkeeping.
- Experience supporting subscription-based or recurring billing processes (e.g., renewals, invoicing, tracking payments).
- Experience working with accounting software (e.g., QuickBooks Online or similar).
- Strong attention to detail and accuracy when handling financial data and documentation.
- Experience collaborating closely with an internal accountant or finance lead.

#### Experience – Preferred:

- Experience supporting SaaS or technology companies with subscription revenue models.
- Experience coordinating or supporting customer renewals, invoicing, or collections.
- Exposure to payroll preparation, commission tracking, and vacation/time-off tracking.
- Experience preparing documentation for GST/PST filings or supporting year-end close activities.
- Familiarity with CRM systems (e.g., HubSpot) or maintaining contract/subscription records.

## **SKILLS & EXPERIENCE**

### **Knowledge, Skills, and Abilities**

#### **Knowledge:**

- Working knowledge of bookkeeping support activities (AP/AR, reconciliations, expense tracking) in a SaaS environment.
- Understanding of subscription renewals, basic payroll concepts, and financial confidentiality requirements.

#### **Skills:**

- Accurately process invoices, expenses, and financial records with strong attention to detail.
- Maintain organized accounting documentation using accounting software and spreadsheets.
- Communicate clearly with internal teams, vendors, and customers on finance-related matters.

#### **Abilities:**

- Ability to manage recurring financial tasks and deadlines independently while uncovering issues or gaps.
- Ability to handle sensitive financial information with discretion and professionalism.
- Ability to collaborate closely with the Finance team while adapting to shifting priorities.