

Job Title	Finance Specialist in transition to Finance Manager	Effective Date:	08/21/2026
Department:	Finance	Revised Date:	

JOB DESCRIPTION

Job Location:	Corporate Headquarters	Company Industry:	Engineering consulting
Job Role:	Finance / Management	Travel Required:	none
Employment Status:	Full Time	Employment Type:	Finance Specialist – non-Exempt, at will Finance Manager – Exempt, at will
Reports to:	Finance Manager	Manages Others:	Finance Specialist – no Finance Manager – yes, Finance Specialist

Position Summary:

We are seeking an experienced accounting professional to initially serve as a Finance Specialist, with primary responsibility for customer billing, accounts receivable, collections, and related accounting activities. This position is intended to transition into the Finance Manager role.

As Finance Manager, the individual will assume broader responsibility for the company's accounting and financial operations, including staff supervision, financial reporting, accounts payable, payroll, tax compliance, internal controls, and financial planning. The ideal candidate will be comfortable performing detailed accounting work while developing into a leadership role that supports management and the company's long-term financial objectives.

Finance Specialist Responsibilities

- Prepare accurate customer invoices.
- Review contracts, purchase orders, labor, billing rates, expenses, and support documentation to ensure compliance with customer and project requirements.
- Coordinate with other departments to obtain information needed for timely invoices and resolve billing discrepancies.
- Process and apply customer payments.
- Monitor accounts receivable aging and perform timely collection activities on past-due accounts.
- Maintain accurate customer accounts, billing information, payment terms, purchase orders, tax-exemption documentation, and credit records.
- Monitor unbilled revenue, work in progress, deferred revenue, retainage, contract limits, and overall project billing status.
- Support revenue recognition, project closeout, and month-end and year-end closing activities.
- Maintain effective procedures and internal controls for billing, collections, cash application, and account reconciliation.
- Recommend improvements to accounting systems and processes, provide backup support for other finance functions, and protect confidential financial information.

Finance Manager Responsibilities

- Direct the company's accounting and financial operations, ensuring accurate records, timely reporting, and compliance with company policies and accounting standards.
- Supervise and develop accounting staff by assigning responsibilities, reviewing work, providing training, and evaluating performance.
- Manage the general ledger and lead monthly, quarterly, and year-end closing processes, including reconciliations, accruals, journal entries, and adjustments.
- Prepare and analyze financial statements, management reports, financial dashboards, and key performance indicators.
- Oversee accounts payable, accounts receivable, project billing, collections, cash application, employee expenses, and corporate credit-card processes.
- Monitor project financial performance, including revenue recognition, work in progress, backlog, billing status, labor utilization, profitability, and project overruns.
- Process or oversee payroll and related reconciliations, deductions, benefits, tax withholdings, records, and regulatory compliance.
- Prepare and file sales and use tax returns and oversee tax registrations, exemptions, taxability determinations, 1099s, and other required filings.
- Coordinate budgeting, forecasting, cash-flow management, working-capital planning, and short- and long-term financial analysis.
- Establish and maintain accounting policies, internal controls, approval requirements, record-retention practices, and fraud-prevention measures.
- Coordinate audits, tax preparation, insurance reviews, and requests from auditors, tax advisors, lenders, and regulatory agencies.
- Manage fixed assets, capital expenditures, depreciation schedules, banking activities, and relationships with outside financial service providers.
- Review customer and vendor contracts for financial, billing, payment, credit, and tax implications.
- Administer accounting, payroll, expense, and project-management systems, including access controls, reporting, automation, and process improvements.
- Provide financial analysis and guidance to project managers, department leaders, executives, and ownership in support of pricing, staffing, capital purchases, and other business decisions.
- Maintain the confidentiality of employee, customer, vendor, payroll and company financial information and perform other related duties as assigned.

Essential Skills:

- Strong knowledge of GAAP.
- Leadership, team management, motivational skills, Interpersonal & strong written and oral and written communication skills.
- Professional demeanor, self-motivated, energetic and enthusiastic with excellent communication and intrapersonal skills.
- Ability to mentor and delegate.
- Attention to detail and superior time management skills.
- Strong analytical skills, ability to work under pressure, decision making & problem-solving skills.
- Strong knowledge of MS Office Applications, accounting software and other business application software. Experience with an ERP is a plus.
- Strong written and verbal communication ability.
- Able to establish priorities and manage workload effectively.
- Self-starter who can work either independently or as part of a team.
- Ability to maintain confidential information and utmost discretion in all presentations and correspondence.

Education and Qualifications:

- Bachelor's degree in accounting or finance from a four-year college or university; 5+ years of progressively responsible experience in general accounting and/or finance for an organization. CPA license is preferred.
- Excellent customer follow-through skills.
- Strong communication skills; both verbal and written.
- Strong knowledge of general ledger application.
- Strong knowledge of MS Office Suite.
- Experience working with an ERP system is preferred (Netsuite a plus).
- Must be self-starter with the ability to work independently and in teams. Able to organize work and establish priorities and manage workload.
- Flexibility to travel to customer sites and other Trident office(s).
- Membership, accreditation or awards in relevant professional groups.
- Ability to make effective presentations to customers or industry groups. Must be comfortable with public speaking.
- Must be able to pass background and drug testing.
- Must be a US citizen or be able to work legally in the United States without sponsorship.

Physical Requirements

Please check all that apply to this position. When appropriate, enter the percent of time the position requires that activity and/or the amount (percentages do not have to total 100%).

Vision Required: ☒ yes ☐ no	Hearing Required: ☒ yes ☐ no
Speaking Required: ☒ yes ☐ no	Ability to detect color required: ☒ yes ☐ no
Proficient in English: ☒ yes ☐ no	PPE required: ☒ yes ☐ no See Hazard Assessment Form link below.
Manual dexterity Required: ☒ yes ☐ no	

Activity	% of time	Activity	% of time
Standing	20%	Sitting	80%
Laying Down	0%	Crouching	10%
Crawling	0%	Twisting	0%
Kneeling	10%	Reaching	5%
Pushing Average Wgt: 25# Max Wgt: 50#	5%	Computer Use	95%
Lifting Average Wgt: 25# Max Wgt: 40#	25%		

PPE Risk Assessment: [\\ta-file\ta_common\Forms & Templates\Published Documents\Business Services\HR\PPE Hazard Forms\PPE Hazard Assessment Form v1 102016_Engineering Team.docx](#).