# Finance and Office Assistant

**Contract Type:** Part time, permanent (0.8 FTE)
**Location:** Auckland

## About Te Ara Ahunga Ora Retirement Commission

Te Ara Ahunga Ora is the office of the Retirement Commissioner. Te Ara Ahunga Ora aims to help New Zealanders to retire with confidence. Retiring with confidence means New Zealanders feel secure that they'll have resources to live and the know-how to make ends meet.

We focus on three areas; Retirement Policies, Retirement Villages and Financial Capability. As part of our role we advise Government on the policies that will enhance retirement outcomes for New Zealanders. We also help support individuals to better prepare for retirement, and we contribute to better understanding of what retirement means in the 21st century. Times are changing.

### TĀ MĀTOU PŪTAKE
**OUR PURPOSE**
Improving financial futures

### TĀ MĀTOU WHAKAKITENGA
**OUR VISION**
A better retirement for all

### TĀ MĀTOU KAUPAPA MĀTĀMUA
**OUR STRATEGIC OBJECTIVES**
Provide ***trusted information***, ***informed advocacy,*** and ***effective collaboration*** on retirement income, retirement villages, and financial wellbeing.

**OUR VALUES**
***Kia manawanui*** Let us be big hearted
***E tipu, e rea*** We embrace the best of both worlds to flourish
***Me hoe tahi*** We paddle as one
***He taonga te pono*** We treasure truth

## Position purpose

The Finance and Office Assistant provides accurate, timely and dependable finance, procurement and office administration that helps Te Ara Ahunga Ora run smoothly. The role is a trusted operational partner to the Finance and HR Operations Manager and to teams across the organisation, as well as a key point of contact for external enquiries. The Finance and Office Assistant ensures timely and friendly support for those seeking guidance from the Commission, routine processes are completed well, records are reliable and practical support is easy to access.

This is a hands-on individual contributor role with broad organisational reach. The role takes ownership within agreed processes and delegations, applies good judgement, anticipates needs, identifies issues early and follows work through to completion. It supports continuous improvement

by making every day finance, procurement, facilities management, and customer service/office management processes simpler, clearer and more reliable.

## Key aspects of the role include

- Maintain efficient and timely accounts payable process, and maintain accurate supporting records and reconciliations.
- Prepare month-end journals, balance sheet reconciliations, and support accurate monthly financial reporting
- Provide timely and approachable office support, including answering phone and email queries on behalf of the organisation.
- Support the Finance and HR Operations Manager to maintain the fixed asset register, ensuring depreciation rates are correct and capitalised in line with accounting standards.
- Provide reliable facilities, travel, and general administrative support across the organisation.
- Assist with data entry to support the organisation's external reporting as needed.
- Provide operational procurement support within the organisation's procurement framework. Assist in the preparation of government procurement reporting.
- Maintain confidentiality, accuracy, service quality and timely follow-through across all work.
- Contribute ideas, practical improvements and a one-organisation approach.

## Working relationships

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| **Reports to:** | Finance and HR Operations Manager |
| **Member of:** | Operations team |
| **Direct reports:** | None |
| **Internal relationships:** | Finance and HR Operations Manager; Executive Assistant and People Experince Specialist; Operations Director; People Managers; budget holders, employees and teams across the Commission. |
| **External relationships:** | Banking provider(s); office and facilities providers; procurement contacts; relevant external advisers and service partners. |

## Areas of accountability and what great looks like

| Accountability | What you deliver | What great looks like |
|---|---|---|
| **Accurate and timely payments** | • Process supplier invoices, employee reimbursements, credit card transactions and approved payment runs in line with internal policies, delegations and controls.<br>• Check coding, approvals, supporting documentation and due dates before processing.<br>• Prepare weekly payment batches.<br>• Follow up missing information and resolve routine discrepancies, escalating material issues promptly. | • Payments are accurate, authorised, supported and completed on time.<br>• Records are complete, easy to retrieve and audit-ready.<br>• Errors or unusual transactions are identified early and addressed appropriately.<br>• Timely payments support small businesses and meet government expectations. |

| Accountability | What you deliver | What great looks like |
|---|---|---|
| | • Ensure appropriate GST treatment and prepare bi-monthly GST returns for approval. | |
| **Month end reconciliations and financial reporting** | • Maintain accurate records, support reconciliations, and prepare month-end reconciliations.<br>• Collate information relating to all Chief Executive expenditure and ensure year end filing.<br>• Use available information and tools to provide timely reporting to Finance and HR Operations manager as needed. | • Accurate journal entries ensure smooth monthly reporting.<br>• Ability to understand discrepancies in balance sheet and resolve or escalate them |
| **Organisation reputation** | • Act as the first point of contact for external stakeholders and members of the public contacting the Retirement Commission, through phone communications and management of office email inbox<br>• Resolve issues and support wider team with general external enquiries | • Members of the public receive a friendly and helpful interaction when interacting with the Retirement Commission<br>• Phone and email queries are responded to, or escalated to the appropriate team member, promptly<br>• External stakeholders find the Retirement Commission approachable and easy to deal with |
| **A well-run workplace** | • Coordinate day-to-day facilities, office supplies, equipment, access, maintenance and general administration.<br>• Liaise with landlords, suppliers and service providers and track requests through to completion.<br>• Help maintain a safe, clean, organised, welcoming and functional workplace.<br>• Support practical office arrangements, inductions, building safety, and business continuity activities as required. | • The Auckland and Wellington offices are organised, safe, welcoming and ready for people to work effectively.<br>• Facilities issues are anticipated where possible and resolved with minimal disruption.<br>• Supplies, access and routine services are available when needed.<br>• The role notices what needs attention, takes initiative and keeps people informed. |
| **Efficient procurement support** | • Provide operational support for sourcing, purchase orders, supplier onboarding, due diligence, approvals, contracts and renewals.<br>• Ensure procurement steps and documentation align with the | • Procurement administration is accurate, timely and well documented.<br>• Approvals and supporting evidence are in place before commitments are made. |

| Accountability | What you deliver | What great looks like |
|---|---|---|
| | framework owned by the Finance and HR Operations Manager.<br>• Maintain procurement, supplier and contract information and monitor key dates and actions.<br>• Support staff to understand and complete routine procurement requirements. | • Renewals, expiries and outstanding actions are visible early.<br>• Business owners receive practical support while retaining accountability for requirements, supplier performance and delivery. |
| **Trusted service and continuous improvement** | • Plan and prioritise work across recurring cycles, deadlines and changing requests.<br>• Build constructive relationships and communicate progress, issues and dependencies clearly.<br>• Identify opportunities to simplify forms, templates, records and recurring processes.<br>• Take ownership of commitments, seek feedback and contribute to shared Operations priorities. | • Work is organised, dependable and followed through without unnecessary prompting.<br>• Colleagues experience the role as approachable, discreet, practical and easy to work with.<br>• Small improvements reduce friction, strengthen accuracy or save time.<br>• The role leads through personal ownership, sound judgement, collaboration and a commitment to the wider organisational purpose. |

## Our values in action

| Value Statement | Examples of the value in action |
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| ***Kia manawanui***<br>*Let us be big hearted* | • Advocates for those in need<br>• Champions change to drive equitable outcomes<br>• Acts with aroha and puts others before themselves<br>• Treats people as they would like to be treated – with respect and empathy<br>• Acknowledges and celebrates the achievements of others<br>• Creates a safe and welcoming space where everyone feels comfortable to contribute |
| ***Me hoe tahi***<br>*We paddle as one* | • Is inclusive and actively seeks input and feedback from their colleagues and other teams<br>• Connects with and inspires people to build great relationships internally and externally<br>• Considers perspectives other than their own<br>• Respects the opinions of others even when they don't agree<br>• Helps glue the organisation into one team |
| ***E tipu, e rea***<br>*We embrace the best of both worlds to flourish* | • Focusses on the opportunities a dual worldview presents, not the obstacles<br>• Introduces new ways of doing and thinking that include viable mātauranga Māori based alternatives<br>• Considers diverse cultural viewpoints in their work and workplace<br>• Consistently looks outward, not just in |

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| | • Actively increases their own knowledge and cultural capability<br>• Prizes the innovation that emerges from respect for difference |
| ***He taonga te pono***<br>*We treasure truth* | • Prioritises the kaupapa, the higher purpose<br>• Is transparent, truthful and honest<br>• Takes ownership and responsibility<br>• Does what's right, even when no one's watching<br>• Follows through on commitments<br>• Acts without ego<br>• Takes a balanced, impartial approach |

## Essential skills and experience

- Experience in finance administration, office administration or a similarly broad operational support role.
- Experience processing payments and maintaining accurate financial records and supporting documentation.
- Competence in answering phones and resolving issues
- Ability to manage multiple tasks and priorities at once
- Experience supporting procurement, suppliers, contracts or purchasing processes.
- Strong organisational skills and the ability to manage recurring deadlines alongside changing priorities.
- High attention to detail, numerical confidence and a disciplined approach to checking work.
- Clear, professional communication and a service-oriented approach.
- Sound judgement, discretion and the confidence to resolve routine issues and escalate appropriately.
- Comfort using finance, and Microsoft 365 systems and learning new tools.

## Position specific:

- Payments, reconciliations and finance administration
- Facilities, office and general administration
- Front of house/reception
- Support with onboarding staff to travel platform and booking assistance as needed
- Procurement and supplier administration
- Confidentiality, judgement and trusted service
- Planning, prioritisation and reliable follow-through
- Continuous improvement and one-organisation contribution

## Acknowledgement

This position description serves to illustrate the scope and responsibilities of the position and is not intended to be an exhaustive list of all tasks and duties. You will be required to perform other job-related tasks as requested and as necessitated by the development of this role and the organisation. This position description may also be modified and updated from time to time to reflect these changes.

I certify that I have read, understood and accept the duties, responsibilities and obligations of my position.

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| _____ | _____ |
| Employee | Date |
| _____ | _____ |
| Manager | Date |