

JOB DESCRIPTION

Position: Investment Coordinator
Mission Area: National Covenant Properties (NCP)
Reports to: Senior Account Manager
Supervises: None
Status: Nonexempt

Summary

The Investment Coordinator will provide customer service and manage investment sales services to the members of the Evangelical Covenant Church. The Coordinator will also be knowledgeable in the area of IRAs, HSAs, Certificate of Investments and other investment offerings in order to provide an exceptional consumer experience. This position will collaborate in operational and administrative support efforts to help advance NCP strategies and mission.

Essential Functions

- Engage in a professional, hospitable, and courteous manner in NCP's electronic, phone and in-person communication. This position is the first point of contact for NCP customer requests.
- Formulate, manage and maintain paperwork in paper/electronic files; updated and organized; as well as create additional customer files as needed. Produce and distribute new certificates, new investment letters, and general customer investment information material.
- Maintain office's databases and data storage systems through data entry and data filing protocols. Monitor current and accurate certificate of property Insurance files for all NCP loans.
- Utilize various office machines and computer applications to expedite daily operations, procedures, or tasks.
- Manage inquiries from external and internal constituency; respond and/or direct to the appropriate staff person for corresponding response or engagement.
- Expedite customer request for certificate redemptions (partial and full), withdrawals from DIA accounts and IRA/HSA distributions.
- Process accounts payable for stakeholders, accurately and in a timely manner.
- Manage office supplies inventory and expedite supply orders, as needed (including stationary and envelopes for semi-annual statement and offering circular mailings).
- Prepare and expedite individual correspondence and/or bulk mailing projects, as well as, business material and products to be used in marketing and communication efforts.
- Conduct online research effectively and efficiently to advance ministry priority efforts
- Perform general support tasks, such as collating, transcribing, organizing, creating documents, information, presentation/binders elements, meeting logistics and hosting, etc. in support of office operations
- Participate in skill development as assigned, such as Ascensus IRA training and other professional development opportunities.

- Participate in events such as Midwinter Conference, Annual Meeting, Triennial, Conference Annual Meetings as assigned to promote NCP Brand.
- Other duties as assigned by Senior Account Manager and/or management

Education and Experience

Required: Bachelor's degree in business, economics, finance or accounting, equivalent combination of education and experience. Knowledge and experience in the investment real estate and/or loan industry. 2-3 years in support role, including experience in an office environment with heavy telephone customer service emphasis. High proficiency in computer and internet technology. Experience in or ability to learn basic accounting principles. Must currently hold or be able to pass Series 63 Securities exam (within 90 days of hire date).

Preferred: Personal engagement with the Evangelical Covenant Church

Skills

- Mastery of Office 365, Microsoft and Windows application, databases development and management, and web technologies.
- Detail oriented, strong organization, prioritization and time-management skills are eminent.
- Excels in attention to detail with high level of accuracy in preparation of financial transactions, written documents, reports and correspondence.
- Effectively communicates in written and verbal forms in person and via communication mediums.
- Works well under pressure and is able to accomplish multiple tasks, with conflicting priorities and timelines. Ability to track and report progress on a wide range of tasks, simultaneously.
- Ability to respond to and deal with a range of ad hoc queries/requests.
- Capable of managing stress by accepting criticism, engaging in conflict resolution, dealing calmly and effectively with high stress situations.
- Ability to operate with discretion and confidentiality at all times, especially related to customer information
- Maintains flexibility in approach and adjusts actions when appropriate.
- Excellent management and people skills to embrace diversity of schedules, backgrounds, formats, contexts, etc.
- Uses critical thinking skills, applying logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions or approaches to address challenges.
- Self-starter, with ability to work independently.

Environment Conditions

Able to work well in professional office setting, occasionally works evenings and weekends. Must be versatile and able to work for prolonged segments sitting or standing. Must engage frequently with office tools and equipment, such as: computer, copier, phone, web-conferencing equipment, cell communication, printers, calculators, scanners, etc. Must be able to occasionally lift or move items, less than 35 lbs.

October, 2016