



## DISCIPLES CHURCH EXTENSION JOB DESCRIPTION

**Job Title:** Financial Services Representative  
**Classification:** Full-time, Exempt  
**Reports To:** Vice President, Investments  
**Start Date:** April 17, 2025 (negotiable)

### **SUMMARY:**

Reporting to the Vice President (VP) Investments, the Financial Services Representative assists in administering the functions of the Investor Services department and assists the Loan Manager with the loan origination and servicing process. The Financial Services Representative also provides excellent customer service to investors, borrowers, and colleagues while ensuring Disciples Church Extension Fund complies with all securities and lending regulations.

### **ESSENTIAL DUTIES AND RESPONSIBILITIES** (Other duties may be assigned based on organizational needs):

#### **FINANCIAL:**

- Maintain client signature cards and resolution files
- Process investment transactions
- Oversee the investment maturity process
- Assist in the investment reporting process
- Scan and index loan/investment information as needed
- Assist with semi-annual, annual, monthly, and quarterly financial responsibilities relating to investments and loans
- Responsible for sending loan-related letters for pay-offs, rate adjustments, follow-up letters, and the like
- Assists with the loan insurance process, including renewals, cancellations, force-placed coverage, insurance claim checks, and new policies for DCEF-owned properties
- Prepares releases (including sending releases to the recording office)
- Communicate returned payments with borrowers
- Track, update, and follow up on payment of invoices related to loans/lines of credit, including but not limited to broker price opinions, appraisals, insurance, and other third-party reports
- Provides back up support for Financial Services Department

#### **ORGANIZATIONAL:**

- Maintain contact records
- Assist in the development of operational procedures and documentation of such procedures
- Take effective minutes at Staff Loan Committee and Board Loan Committee meetings

#### **CUSTOMER SERVICE:**

- Maintain online users' information, including login data
- Respond to customer needs
- Processing web requests
- Investment and Loan and email communications
- Provide internal customer service
- Receive calls and monitor messages for the Financial Services Department

**SUPERVISORY RESPONSIBILITIES:**

- None

**QUALIFICATIONS:**

- Experienced with computer-based programs and spreadsheets
- Proficient with a calculator
- Understanding of and commitment to Disciples Church Extension Fund's mission, vision, and core values

**EDUCATIONAL REQUIREMENTS AND/OR EXPERIENCE:**

Bachelors/Associated Degree or equivalent experience

**CERTIFICATES, LICENSES, REGISTRATIONS REQUIRED:**

- Certified IRA Services Professional (preferred)
- Series 63 Certification (preferred or ability to take and pass the test)

**TRAVEL:**

Minimal travel (up to 10%) required for meetings and professional enrichment

**PHYSICAL/ENVIRONMENTAL DEMANDS:**

- Hybrid office environment
- Occasional lifting to 40 lbs.
- Long periods of sitting at a desk on a computer

**BENEFITS:**

Comprehensive health insurance that includes dental and vision options, generous paid time off, employer-sponsored retirement plan, paid parking, as well as opportunities for professional development and growth.

**EEOC STATEMENT:**

*Disciples Church Extension Fund (DCEF) is an Equal Employment Opportunity Organization. Every effort will be exercised to ensure that employment consideration is given to all persons without regard to race, color, religion, sex, sexual orientation, gender identity, national origin, age, disability, genetic information, veteran status, or any other characteristic protected by law. Every effort will be made to employ the most qualified individuals without regard to the above factors.*

To apply for this position, please submit a letter of interest and current resume to [hr@disciplescef.org](mailto:hr@disciplescef.org) with the subject line: **DCEF Search: Financial Services Representative.**

**DEADLINE:** March 24, 2025