



**Announcement for Job Posting Opening
Disciples Church Extension Fund
DIRECTOR OF INVESTMENTS**

Description: The person in this position will oversee and manage the investment department. Responsibilities include the completion of annual registrations, the annual circular, ensure compliance with state investment laws, provide excellent customer service, process transfers, and attend the interest rate team. This person will be an expert in the investment process and compliance regulations for the states that we service. They will lead the investment team to ensure timely, accurate, and excellent customer service, acting as a back-up for investment customer service when necessary.

ESSENTIAL DUTIES AND RESPONSIBILITIES include the following. Other duties may be assigned.

FINANCIAL

- Keeps track of and maintains the organization's securities registrations and reporting process, completing registrations timely and accurately.
- Works with marketing and advisors to grow the Investor Services investor base.
- Works with the Financial Services Team to maintain adequate liquidity, relaying information as needed and known concerning investment deposits and redemptions.
- Leads the process of preparing and editing the annual Offering Circular (audit to come from Finance).
- Manages the Anti Money Laundering Compliance Program.
- Monitors and regularly reports back to the CFO trends in investments, interest rates, and securities.
- Participates in the interest rate team, monitoring, benchmarking, and investigating interest rate developments and trends, including current rates for other lenders, and more specifically, competitors.
- Meets or exceeds goals set by the organization and the supervisor in alignment with the Strategic Plan.
- Manages budget for department.

LEADERSHIP

- Oversight of the organization's securities, investment sales, and investor services.
- Maintains investment policies and strategies and completes an annual review of these policies, advising the Board Finance committee of investment and portfolio management details and recommendations as needed.
- Advises Financial Services Team around trust and estate matters, collaborating with outside counsel as necessary.
- Lead contact with General Counsel regarding securities compliance, registrations, and filings.

- Regularly monitors the investment activity and compares it to projections to track progress and variances to plan, discussing with the CFO as needed.
- Oversees the annual Conflict of Interest Form to all employees, ensuring that everyone has received, reviewed, signed, and returned these forms as directed.

DECISION MAKING

- This person will be an expert in the investment process and compliance regulations for the states that we service.

CUSTOMER SERVICE

- Provides backup for other investment team members in all duties, including answering overflow calls and covering time off. This also includes additional coverage during busy periods.

SUPERVISORY RESPONSIBILITIES

- Mentors, manages, trains, and provides feedback to direct reports.
- Completes semi-annual evaluations and reviews with direct reports.
- Meets with staff regularly to review current issues, track goals, assign tasks, and provide training opportunities.
- Works with leadership to provide a safe environment with opportunities to succeed.
- Supervises Financial Resources Representative - Investments

POSITION QUALIFICATIONS/COMPETENCIES

- Strong background and knowledge of investments, securities, interest rates, and banking is required. Prior experience in a not-for-profit environment is a plus.
- Understanding of and commitment to Disciples Church Extension Fund's mission, vision, and core values.
- Prior experience successfully leading an investment department, managing staff, is strongly preferred.
- Must possess the ability to think strategically while managing short-term and long-term issues.

PREFERRED EDUCATIONAL REQUIREMENTS AND/OR EXPERIENCE

- Bachelor's degree in general business, finance, or accounting is required.
- A master's or other advanced degree is a plus.

CERTIFICATES, LICENSES, REGISTRATIONS REQUIRED FOR JOB

- Series 63 required
- Series 7 preferred

TRAVEL

- Minimal travel required for meetings and professional enrichment.

PHYSICAL/ENVIRONMENTAL DEMANDS

- Hybrid office environment

COMPETITIVE SALARY AND FULL BENEFITS OFFERED

- 14% of salary contributed to a fully funded pension plan.
- Health insurance plans available with partial employer paid premiums.
- Employer-paid premiums for life, dental, and vision insurance.

Interested and qualified candidates should submit a cover letter, resume and salary requirements to:

Rhonda Hopewell
Vice President
Disciples Church Extension Fund
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Indianapolis, Indiana 46207
rhopewell@disciplescef.org

Disciples Church Extension Fund does not discriminate in employment opportunities or practices based on race, color, religion, sex, national origin, age, disability, genetic information, or any other characteristic protected by law.