



# Investment Coordinator I

## Job Description

Investment Coordinator I

### About CDF Capital

CDF Capital was founded in 1953 with a single mission to help churches grow. At that time, the most significant barrier for church expansion was access to the financial capital needed to purchase land and construct buildings, so we stepped in and provided loans and investment options to help fund these projects.

Today, we recognize that church growth and sustainability require much more than money. We see the need for leadership development and spiritual resources, and are uniquely positioned to provide comprehensive services—what we call Transformational Capital, which is the ideal resourcing of Financial, Leadership, and Spiritual Capital—to address each of these needs.

### Position Summary

Reporting to the Director of Investor Relations, the Investment Coordinator I provides superior customer service primarily through making outbound and receiving inbound calls in the Call Center. Performs a variety of tasks to plan and accomplish goals in handling all areas of the customer's needs. Works under the close supervision of the Director of Investor Relations and uses initiative and independent judgment within established policy and procedural guidelines.

## Essential Functions

- Telephone contact and follow-up with prospective customers who have expressed interest in CDF investments
- Track customer contact in CRM software
- Track pending new investment applications until completed
- Telephone customers with renewing investments for the purpose of investment retention
- Assist call-in customers who want to renew their investments
- Provide backup for other Investment Coordinators, as needed
- Input completed new investment and renewal information into Phoenix software program
- Periodic posting of investments, withdrawals, ACH transactions, incoming and outgoing wires
- Process incoming checks for deposit to Bank
- Distribute incoming emails and faxes
- Provide general clerical support to the Investment team
- Perform special projects and duties as assigned.

## Key Qualifications

- A living, vital faith in Jesus Christ
- Series 63, or the ability to study for and pass it
- Three years of experience in a similar industry; and/or or two-year college degree
- Strong oral and written communication skills
- Strong computer skills including experience using MS Word, Excel, etc.
- Strong problem solving skills with the ability to develop and/or recognize creative, appropriate solutions that enhance team services.
- Willing and able to adjust to multiple demands, shifting priorities, and rapid change to reach team objectives

## Working Conditions

The physical demands described here are representative of those that must be met by the employee to successfully perform the essential functions of the position. Reasonable accommodations may be made for individuals with disabilities to perform the essential functions. The employee must sit for prolonged periods, and stand, walk reach, twist, turn, bend, and stoop in the performance of daily office activities. The employee must be able to grasp, use repetitive hand movements and fine coordination to use a computer keyboard. The position also requires the employee to use near vision in reading correspondence, data and using a computer. Hearing is required when communicating by phone and/or in person. The need to lift, drag, and push files, paper and documents weighing up to 25 pounds is also required.

## General Information

The above statements are intended to describe the general nature and level of work being performed by individuals assigned to this position. They are not intended to be an exhaustive list of all duties, responsibilities, and skills required of personnel so classified.

## Equal Employment Opportunity

The Company is an equal opportunity employer and makes employment decisions on the basis of merit, qualifications and abilities. We want to have the best available person in every job. Company policy prohibits unlawful discrimination based on race, color, sex, marital status, age, national origin or ancestry, physical or mental disability, medical condition including genetic characteristics, or any other consideration made unlawful by federal and state laws and local ordinances applicable to non-profit religious corporations that are part of the Provision family. Such discrimination is unlawful. As an integral part of the Christian Church/Churches of Christ, the Company's non-profit ministries can and do discriminate on the basis of its religious beliefs and practices, as allowed.

All state and federal equal employment and anti-discrimination laws are applicable to the Company's for-profit entities, which are not exempt from religious or any other unlawful discrimination.

This equal employment opportunity policy applies to all persons involved in the operations of the Company and prohibits unlawful discrimination by any Company employee.