



Church Development Fund, Inc.

Job Description

Title: Investment Servicing Representative
Reports to: Investor Relations Manager
Department: Investor Relations
Classification: Full time
FSLA: Non-exempt

Position Summary

The Investment Servicing Representative interacts with both new and existing customers, relying on experience and judgment to perform a variety of complex tasks. Works under the general supervision of the Investor Relations Manager.

Essential Functions

- Provide online investment access support to customers
- Maintain completed new and renewal investment data files.
- Review investment/accounting files for accuracy and maintain digital storage
- Open and distribute daily incoming mail
- Post daily investments, withdrawals, ACH transactions, incoming and outgoing wires
- Process incoming checks for deposit
- Track customer contacts in CRM software
- Track pending new investment applications until completed
- Maintain and balance investment interest distributions, ACH transaction batches, monthly and quarterly reports within both the banking system and Phoenix system, with emphasis on data integrity
- Process all return mail for address changes, researching data as required, and correcting the database
- Research dormant investments before the investments are escheated to the state
- Provide general clerical support to the Investment teams
- Perform special projects and duties as assigned

Key Qualifications

- A living, vital faith in Jesus Christ
- Two years of business-related experience or two years of college
- Strong oral and written communication skills
- Strong attention to detail
- Strong computer skills, including experience using MS Office products
- 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 accommodation 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 and 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 while 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.

Equal Employment Opportunity

CDF Capital is both an equal opportunity employer and a faith-based religious organization. We conduct hiring without regard to race, ethnicity, national origin, citizenship, age, sex, marital status, membership in any labor organization, political ideology, or disability of an otherwise qualified individual. The status of CDF Capital as an equal opportunity employer does not prevent us from hiring staff based on their religious beliefs so that all employees share the same religious commitment, which is central to our mission."