



Church Development Fund, Inc.

Job Description

Title:	Investment Coordinator
Reports to:	Investment Relations Manager
Department:	Investor Relations
Classification:	Full-Time
FSLA:	Non-Exempt

Position Summary

The Investment Coordinator 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 Investment Relations Manager 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 the bank
- Distribute/respond to 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 a 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

This position requires prolonged sitting, standing, walking, reaching, twisting, turning, bending, and stooping in the performance of daily office activities. It also requires grasping, repetitive hand movements, and fine coordination in providing financial reports and data using a computer keyboard. Additionally, the position requires near vision in reading a computer screen. Hearing is required when communicating by phone and/or in person. The need to lift, draft, 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, gender, 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.