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## Investment Servicing Representative

### Position Details

- Reports to: Director of Investor Relations
- Department: Investor Relations
- Location:
- Classification: Full-Time
- FLSA: Non-Exempt

### Summary

The Investment Servicing Representative interacts with both new and existing customers and performs a variety of complex tasks, relying on experience and judgment to plan and accomplish goals in handling all areas of the customer's needs. Works under the general supervision of the Director of Investor Relations and uses initiative and independent judgment within established policy and procedural guidelines.

### Essential Functions

- Follow procedures in Process Street
- Provide online investment access support to customers
- Input completed new investment and renewal information into Phoenix software program
- Scan investment/accounting files into digital storage
- Review investment files for completeness prior to scanning
- Open and distribute daily incoming mail
- Daily post investments, withdrawals, ACH transactions, incoming and outgoing wires
- Process incoming checks for deposit to Bank
- 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 correspondent banking system and Phoenix system, with emphasis on data integrity
- Process all return mail for address changes, researching data as required and correcting database
- Research dormant investment 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 experience business-related experience or two years college experience
- 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

## General Information

### Benefits

CDF Capital provides a generous benefits package that includes paid time off, health, dental, vision, and a 403(b) retirement program.

### 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.

### 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 Church Development Fund, Inc. 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.

### Disclaimer

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.

## About CDF Capital

Helping Churches Grow Since 1953

We believe that every person is on a spiritual journey of transformation, and the best place for that journey to happen is in God's Church. Church growth, however, is about more than just attendance – it is about discipling spiritually maturing believers, creating a culture of healthy leadership, and exercising sound financial stewardship. When we partner with the Lord and with churches to generate Spiritual, Leadership, and Financial Capital, the results are transformational. We call this Transformational Capital.

To learn more about CDF Capital, please visit [www.cdfcapital.org](http://www.cdfcapital.org).