



Susquehanna Conference of the United Methodist Church

Job Title:	Fund Specialist	Location:	Mechanicsburg
Department/Group:	Finance/Loan Fund	Travel Required:	Yes
Experience:	1-3 Years Preferred	Position Type:	Full-Time
SUSUMC Contact:	Lauren E. Hokamp	Date Posted:	
FLSA Status	Non-Exempt	Posting Expires:	

External Posting URL:

Internal Posting URL:

Applications Accepted By:

<p>EMAIL: lhokamp@susumc.org Subject Line: Fund Specialist Job Posting</p>	<p>MAIL: Lauren E. Hokamp Susquehanna Conference of the United Methodist Church 303 Mulberry Drive, Suite 500 Mechanicsburg, PA 17050</p>
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Job Description

SUMMARY

Provides a wide range of support to the Executive Director of the Fund. This position is responsible for processing daily loan and investment transactions, maintaining electronic and paper account files, interacting with borrowers and account holders, and ensuring compliance with fund policy and procedure.

ROLE AND RESPONSIBILITIES

- Process new loan and investment account requests;
- Process loan and investment account closing requests;
- Process invoices, incoming and outgoing account checks, and uncashed checks;
- Draft correspondence;
- Provide account services to account holders by receiving deposits and loan payments and answering questions in person, by email, or on the telephone;
- Cross-sell products by answering inquiries; informing account holders or potential account holders of services, ascertaining needs, and directing them to the appropriate person;
- Follow-up with Executive Director regarding required account documentation;
- Process ACH items, wires and interest checks;
- Process daily account maintenance requests in accordance with Fund policy and procedures and file properly;
- Ensure documents are properly stored and maintained in the Fund’s electronic document storage system;
- Process and monitor new account documents;
- Provide account holder support for all account access devices offered by the Fund;
- Maintain detailed records on all work responsibilities;
- Maintain account files in accordance with Fund policy and procedures;
- Responsible for timely responses and dedicated support for all incoming communications via email, phone, fax, and online;



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- Responsible for daily compliance with all Fund policy and procedure;
- Maintain confidentiality when necessary;
- Process returned mail;
- Back up co-workers as assigned;
- Perform all other duties assigned.

EDUCATION/EXPERIENCE

Bachelor's Degree or equivalent experience

1-3 years of experience in accounting, banking, finance, or transaction processing preferred

KNOWLEDGE, SKILLS, AND ABILITIES

- Experience with ACH and wires and knowledge of accounting or banking software;
- Courteous and professional customer service attitude;
- Excellent verbal and strong written communication skills for interacting professionally with clients and relating to other co-workers;
- Ability to perform tasks quickly and accurately;
- Ability to effectively manage time as related to daily tasks;
- Ability to prioritize multiple demands in high pressure environment while maintaining professional demeanor;
- Ability to solve practical problems;
- Effective interpersonal relationships with management and team members; and
- Skilled in operation of personal computer, including Word, PowerPoint, and Excel.

PREFERRED SKILLS

1-3 years banking operations experience or equivalent experience.

Familiar with loan processing and documentation and real estate documents.

HISTORY/BACKGROUND

The Conference was formed as the Central Pennsylvania Conference of the United Methodist Church in 1970. In 2010, portions of the Wyoming Conference of the United Methodist Church were transferred to the Central Pennsylvania Conference and the name of the organization was changed to the Susquehanna Conference of the United Methodist Church.

As of December 31, 2016, the Conference includes approximately 881 United Methodist churches in 33 counties of northeastern, north central, central and south-central Pennsylvania, including the cities of Scranton, Harrisburg, York, Williamsport and Wilkes-Barre, and one church located in the Southern tier of New York state. Its administrative headquarters are at 303 Mulberry Drive, Mechanicsburg, PA 17050 and its telephone number is (717) 766-7441. The Conference is divided into seven (7) districts each of which is headed by a District Superintendent.

The Conference maintains a Loan Committee which is tasked with administering a separate account within the Conference designated as the Loan Fund (the "Fund"). The Fund is operated by a staff at the Conference consisting of an Executive Director and Conference Treasurer/Comptroller reporting to



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the Loan Committee and a staff of Fund Specialists. The Fund staff is together tasked with administering the fund on a daily basis.

The Fund exists primarily to extend loans to United Methodist churches within the Conference to acquire, construct, renovate and repair church property (including parsonages). The Fund does not extend loans to individuals nor does it make operating loans, extend lines of credit, finance vehicles or office equipment or participate in loans originated by others. Assets of the Fund may be made available to the Conference primarily for financing capital improvements of the Conference.

The source of funds for these loans is the offer and sale of unsecured investment certificates ("Investment Certificates") solely to (i) United Methodist churches located within the Conference in Pennsylvania, (ii) individuals who certify that they are members of United Methodist churches located within the Conference in Pennsylvania, are at least 18 years of age and bona fide residents of Pennsylvania, (iii) clergy (as defined in the current Book of Discipline of the United Methodist Church) of the Conference who are bona fide residents of Pennsylvania, (iv) the Conference, and (v) the Northeastern Jurisdictional Conference of the United Methodist Church. The Conference, through the Committee, generally offers these Investment Certificates for sale on a continuous basis. The Investment Certificates are securities under both federal and state securities laws. Although the Investment Certificates are exempt from registration under federal law, the Conference registers the Investment Certificates annually with the Pennsylvania Department of Banking and Securities (the "Department").