

SOUTHERN UNION CONFERENCE

Job Description



Job Title:	Southern Union Revolving Fund (SURF) Director, So. Union Conf. Association (Association) Treasurer	Type Of Position:	Hours Per Week <u> N/A </u>
Location:	302 Research Dr., Norcross, GA 30092	Full Time <u> X </u>	
Department:	SURF/Association	Part Time <u> </u>	Exempt <u> X </u>
Reports To:	President	Intern <u> </u>	Nonexempt <u> </u>

POSITION SUMMARY:

The primary role for the SURF Director/Association Treasurer is to serve as an advisor and facilitator to all areas within the Southern Union Revolving Fund and Association Department. Responsible for managing SURF operations, Association's Trust and financial accounting, monitors cash flow and investments, attends related committees & meetings, ensures legal matters and prospectuses are up to date, authorizes disbursements, and oversees Association's accounting and financial operations.

SCOPE OF RESPONSIBILITY:

- Manage departmental personnel.
- Oversee departmental customer service procedures to maintain and improve client satisfaction.
- Determine and authorize use of legal counsel as needed.
- Management of the loan process; application screening, approval of loan draws; manage loan activity and authorization of note prep and sending.
- Oversee routine accounting; JV review, sinking fund allocation, wire approval, bank notifications, statements, year end, etc.
- Prepare monthly statements and reports.
- Oversee account and bank confirmations and other audit related tasks as necessary. Finalize list of required items and assign tasks to department.
- Effectively direct and facilitate weekly departmental meetings.
- Planning and execution of new department functionality. Items to include, new/clear application forms, loan policies, cross training, and create online/automated functionality.
- Oversee all annual tax preparation.
- Manage all aspects of Investment Portfolio include account reconciliations, approval of sale/purchase of investment assets, banking and investment manager relationships, investment committees, Prospectus preparation includes all states, and all fund function rules in compliance to State and Federal regulations.
- Attend Investment, Union Executive, Trust Acceptance, SURF/Association Boards, and Audit Review Committees as scheduled.

RECOMMENDED EDUCATION/EXPERIENCE:

- Bachelor's degree in Accounting, Finance, Business Administration or related field.
- Certified in Planned Giving and Trust Services.
- Advanced computer proficiency.
- Exposure to or experience in Investing.

KNOWLEDGE AND SKILL:

Knowledge of principles, policies, and beliefs of the Southern Union Conference and the Seventh-day Adventist Church. Knowledge of church structure and organization, including committee procedures, etc. Excellent interpersonal and communication skills including proficiency in verbal and written form. Demonstrate leadership and organizational skills. Ability to perform administrative functions; to develop long- and short-term plans and programs; and to establish and maintain effective relationships with internal/external personnel.

CONTACTS, ORGANIZATIONAL RELATIONSHIPS:

Contact with church leaders, outside organizations, and lay persons, as well as Southern Union personnel at all levels. Must possess advanced interpersonal skills and project a professional Christian image.

PHYSICAL REQUIREMENTS:

Must be able to read, speak, and hear in English and Spanish languages. Must be able to effectively communicate both orally and in writing. Some standing, walking, bending, kneeling, carrying of light items, etc. required. Moderate travel within the Southern Union Territory is required.

WORKING CONDITIONS:

Essential responsibilities are performed in sedentary and comfortable manner. Tasks are usually performed under normal office conditions with little or no noticeable discomfort. Work area is well-lighted and ventilated.