

SOUTHERN UNION CONFERENCE

Job Description



Job Title: SURF Loan Specialist	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: SURF Director/Association Treasurer	Intern <u> </u>	Nonexempt <u> </u>

POSITION SUMMARY:

The role of the Southern Union Revolving Fund Loan Specialist is to perform moderately complex loan requirements and accounting duties. Work involves setting-up, processing, servicing, and monitoring loans and accounts. Works under general supervision with moderate latitude for independent judgment.

Essential Job Functions:

- Process/screen, and respond to loan requests/applications.
- Collect and organize loan applications for review by SURF Director/Association Treasurer to take to SURF Committee; notify loan applicants of action taken by SURF Committee.
- Manage all aspects of loan preparation and ongoing follow-up of outstanding loans.
- Annual property insurance follow-up.
- Prepare/send amortization schedule and payment coupons.
- Responsible for maintaining loan amortization schedules, loan aging, loan payoff and closeout.
- Initiate mortgage processes, which include but not limited to, recording/modification/release of mortgages.
- Verify insurance coverage per policy requirements, title search, title insurance, and property insurance requirements before releasing loan funds.
- Generate and process all electronic transfers, bank wires and notifications, and positive pay transactions.
- Reconcile and balance all bank accounts within the SURF Department.
- Prepare bank confirmations for SURF and Association audits.
- Assist with preparation of monthly financial statements for the Association.
- Prepare reports as required by Association Treasurer and committee chairperson.
- Respond to audit needs as requested.
- Attend SURF/Association Board meeting.
- Other departmental duties as required by SURF Director/Association Treasurer.

RECOMMENDED EDUCATION/EXPERIENCE:

- Bachelor’s degree in accounting, business or equivalent required.
- Trust Training and Certification preferred.
- Strong knowledge of office software such as Word, Excel and Access.

KNOWLEDGE AND SKILL:

Knowledge of principles, policies and beliefs of the Southern Union Conference and the Seventh-day Adventist Church. Ability to apply accounting principles to accounting procedures. Proficient in basic computer knowledge with specific ability to use spreadsheets and related software. Must possess excellent communication and organizational skills, strong attention to detail, and problem solving abilities. Good internal and external customer relations as well as effective and responsive telephone etiquette. Demonstrate knowledge of, confidentiality standards and the code of ethical behavior.

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 the English language. Must be able to effectively communicate both orally and in writing. Some standing, walking, bending, kneeling, carrying of light items, etc. required. Minimal travel 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.