

The **Financial Education Events Specialist** is a critical member of Advancial Federal Credit Union. This individual develops and implements business relations activities and strategies to promote growth and positioning of the Credit Union and its products and services primarily among select employer groups (SEG). The ideal candidate has at least two (2) years of related experience in a professional environment, and excellent communication skills.

Scope of Responsibilities:

- Develops and implements business relations activities and strategies to promote growth and positioning of the Credit Union and its products and services primarily among select employer groups.
- Serves as the Credit Union's outside sales representative by actively identifying, cultivating, soliciting, acquiring, developing and servicing relationships with targeted businesses and groups.
- Develops an ongoing planned program for scheduled site visits, tracking site visits and reporting of site visits.
- Involved in annual Business Plan and Budget creation and execution.
- Responsible for managing a budget.
- Markets full participation to new members through active promotion of Credit Union products and services during enrollment activities.
- Regularly presents financial education to current and prospective members in order to increase Credit Union participation.
- Provides creative assistance in collaboration with Marketing Department which is critical in content creation.

- Provides comprehensive written reports on development efforts.
- Provides statistical reports as needed and keeps outlook calendars current of all activities.
- Responsible for maintaining a working knowledge of computer equipment and software required including SEG Manager, Symitar, eDocs, PerformancePro, Microsoft Word, Excel, PowerPoint, Outlook, etc.
- Keeps up-to-date on all Advancial products and services.

This position requires regular non-traditional/weekend hours.

Personal Qualities: Enthusiastic, service-minded, honest, self-starter, principled, creative, committed to others, action-oriented, and highly resourceful.

Required Qualifications:

- Bachelor's Degree (B.A.) from four (4) year college or university; or two (2) years related experience.
- Highly proficient with MS Outlook, Word, Excel, and PowerPoint.
- Impeccable communication skills, both written and verbal.
- Highly professional, responsible, engaging and effective.
- Exceptionally organized.

- Strong customer service orientation.

Desired Qualifications:

- Experience in financial services.

- Bilingual.

Location: Advancial Federal Credit Union is located in Uptown Dallas. Our Corporate office is within walking distance of the Akard DART station.

This position requires regular non-traditional/weekend hours.

TRAVEL REQUIREMENTS

Travel requirements are related to local and regional business opportunities with respect to frequency and scope. Out of state travel will occasionally be required.

With a history dating back to 1937, Advancial is an established and proactive full-service financial institution providing personal, convenient and innovative financial services to individuals and select group partners. Our mission is to create lasting value for our members through superior service, quality products, and innovative solutions.

*It is a requirement of Advancial Federal Credit Union that our employees have credit current and in good standing, therefore background and credit checks will be required. **Credit must be in good standing** with no collection, repossession, or charge off accounts.*

The Advancial Difference: Recognized with numerous “Best Places to Work” and other workplace awards, Advancial offers competitive salaries; a superb benefits package; and a team environment where experience and achievement are valued and rewarded.

Equal Opportunity Employer

Link to apply:

https://advancial.silkroad.com/epostings/index.cfm?fuseaction=app.jobinfo&jobid=208751&company_id=15993&version=1&source=ONLINE&jobOwner=992317&aid=1

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