

**DOVER FEDERAL CREDIT UNION
POSITION DESCRIPTION**

TITLE:	Investment Services Administrative Assistant	CLASSIFICATION:	Non-exempt
DEPARTMENT:	Investment Services	REPORTS TO:	Investment Services Representative
DATE REVISED:	February 2009	SUPERVISES:	N/A

General Summary

Responsible for projecting a positive image for Dover Federal Credit Union Investment and Retirement department by scheduling appointments with members, marketing program to Credit Union employees and members, and performing various administrative and clerical duties as assigned.

Essential Functions

1. Promptly receive and announce employees and members to the Investment & Retirement Representative.
2. Schedule appointments with the Investment & Retirement Representative for members and employees.
3. Answer telephone, disseminate information, resolve and/or refer questions regarding the program to the Investment & Retirement Representative.
4. Maintain and update marketing lists. Order and distribute marketing materials to branches. Ensure all material is updated quarterly. Prepare new member packets.
5. Process and distribute all mail, along with interoffice correspondence and deliveries. Coordinate mailings of newsletters, surveys, annual letters, and appointment information forms.
6. Provide administrative and clerical support to the Investment & Retirement Representative as required. This may include generating correspondence or reports; ordering supplies; managing calendars; assembling packets; assisting with seminars; coordinate lobby displays; reviewing paperwork for errors; etc.
7. Utilize Credit Union and CUNA Corporate procedures and computer applications that may include email, internet, word processing, spreadsheet, database, and system software.
8. Update and file quarterly and monthly reports accordingly.
9. Assist Investment & Retirement Representative with seminar preparation.

NOTE: The list of essential functions is not exhaustive. It may be supplemented as necessary from time to time.

Additional Functions

1. Establish and enhance Credit Union relationship with members.

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2. Track employee referrals.
3. Read and learn new investment & retirement education materials.

Job Specifications

1. Requires education equivalent to a four-year high school education.
2. Some or similar related experience in an office setting.
3. Professional, well-developed communication and interpersonal skills essential to deal courteously and effectively with a diverse group of callers, visitors, and vendors.
4. Work requires basic working knowledge of Word and Excel.
5. Basic mathematical skills required (adding, subtracting, multiplying, dividing).

PHYSICAL REQUIREMENTS:

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is frequently required to sit, use hands to finger, handle or feel, reach with hands and arms, and talk or hear. The employee is occasionally required to stand, walk, bend, kneel, and reach above or at shoulder level. The employee must occasionally lift/push/pull and/or carry up to 15 pounds.

Disclaimer

The above information on this description has been designed to indicate the general nature and level of work performed by employees within this classification. It is not designed to contain or be interpreted as a comprehensive inventory of all duties, responsibilities and qualifications required of employees assigned to this job.

Employee Signature

Date