

POSITION TITLE: Vice President, Financial Wellness

REPORTS TO: Chief Strategy Officer

PAY GRADE: 16

DEPARTMENT: Sales and Marketing

FLSA STATUS: Exempt

PURPOSE: The primary role of the Vice President of Financial Wellness is to develop a highly effective team of employees focused on delivering Financial Center's niche of being a premiere provider of financial wellness to our members, business partners, and communities. The Vice President of Financial Wellness position exists to help achieve the Credit Union's growth goals, specifically membership growth and share of wallet growth. This position is responsible for leading people, developing strategy, managing change, and recommending products, technology and education solutions that provide member value and deliver our brand - resulting in an increase of market share within Financial Center's footprint.

CULTURAL EXPECTATIONS:

- Adheres to Financial Center's Policy and Procedures
- Acts as a role model within and outside Financial Center
- Maintains a positive and respectful attitude
- Communicates regularly with supervisor about department issues
- Demonstrates flexible and efficient time management and ability to prioritize workload
- Consistently reports to work on time prepared to perform duties of position
- Meets Department productivity standards
- Demonstrate enthusiastic support of corporate mission, core values and long-term objectives.
- Provides professional and courteous communication with members
- Communicates effectively and efficiently with Credit Union employees while being professional and courteous at all times
- Project a professional appearance and attitude at all times when representing the credit union
- Must possess a high degree of integrity, have the quality of engendering enthusiasm, confidence and loyalty

ESSENTIAL DUTIES:

- Effectively lead assigned teams to support team members' personal growth and development plans
- Ensures team members meet or exceed annual production and referral goals
- Ensures staff delivers an exceptional member service to every member, every time by delivering consistent, high-quality service to both internal and external members that is in alignment with our Service Promises
- Serves as a member of Financial Center's executive team, owning leadership and strategy that supports credit union objectives
- Oversees the Credit Union's Health Savings Account and WorkPerks programs - developing strategy, products and technology solutions that meets members where they are
- Oversees the Credit Union's financial literacy initiatives including webinars, SEG classes, web-based learning platform, podcast, employee classes, and content for all channels

- Manages partnership and sponsorship with Ball State University and the Miller College of Business
- Works closely with the Assistant Vice President of International and Community Outreach to ensure financial wellness consistency
- Participates as a member of Financial Center's International Advisory Council
- Coordinates with marketing department to promote financial literacy through social media and email on a regular basis
- Develops event schedules with a variety of topics to promote our financial literacy programs
- Performs business development activities that result in increased sales of Credit Union products and services. These activities include, but are not limited to: Site visits, Member Education, Community events, Large and small group presentations, Networking activities
- Develops community partnerships and maintains positive community and credit union relationships, participating in community activities that support the initiatives and direction of the organization
- Develops positive peer relationships within executive leadership at Financial Center, managers of other credit unions, credit union organizations, state league and supervisory authorities
- Attends credit union conferences, conventions, seminars and other educational meetings, as appropriate

REQUIRED BACKGROUND:

- Knowledge typically acquired through a combination of the completion of a Bachelor's Degree in Education, Business Administration or Finance
- 10-15 years of similar or related experience
- Must maintain the Certified Credit Union Financial Counselor designation
- Verifiable successful outside individual or business sales experience required
- Demonstrates the ability to lead and motivate teams to produce quality results and achieve established growth metrics
- Interpersonal - The ability to motivate or influence others, obtaining cooperation (internally and/or externally)
- Must be proficient in the use of basic Microsoft Office applications Word, Excel and PowerPoint)
- Ability to function in a goal-oriented atmosphere
- Ability to participate in and facilitate group meetings
- Must be able to plan and manage at both strategic and operational levels
- Must have effective written and verbal communication skills
- Must be able to deal effectively with employees, members and officials with tact and diplomacy
- Extremely effective public speaking skills and presence
- Should be familiar with the Credit Union bylaws, policies, procedures and state and federal laws affecting all operations of the Center

- Should have a thorough knowledge of all Credit Union products and services

WORK ENVIRONMENT: The work requires physical mobility within the general work environment including some travel locally and infrequently to other areas within the United States. Will be required to make presentations to alternate shift schedules and hours will be based on the needs of the position and could include both evening and weekend hours. Employee may exert up to 25 pounds of force while lifting and carrying presentation supplies. Work is performed in an office or meeting room but requires frequent hands-on involvement throughout the entire Credit Union area of responsibility to include all offices of Headquarters and all branch locations. The ability to work remotely some of the time is permitted.