

MEA Financial Services is deeply committed to diversity and inclusion in its hiring practices. We are an affirmative action, equal opportunity employer. People of color, women, and members of other historically marginalized social identity groups are encouraged to apply.

MF 04-21-22

DATE OF POSTING: June 30, 2022

TERMINATION DATE FOR APPLICATIONS: July 8, 2022

POSITION: **SERVICE REPRESENTATIVE III - INVESTMENT**

COMPENSATION/BENEFITS: Per FSA/USO Contract
Grade G

STAFF RELATIONSHIP: Responsible to Ashley McGillis
Investment Manager, Chief Operations Officer

EMPLOYMENT DATE: As soon as possible

SEND APPLICATION AND RESUME TO: **Human Resources Department**
Michigan Education Association
1350 Kendale Blvd., P.O. Box 2573
East Lansing, MI 48826-2573

BASIC PERFORMANCE EXPECTATIONS:

Represent the corporation with respect to the service of all products to a variety of customers through the use of phone and mail correspondence. Work is highly technical in nature and requires ongoing training and extensive knowledge of investment laws, concepts, and procedural skills. Advise members of investment options and the suitability of each investment.

This job requires the ability to establish and maintain effective working relationships with members and servicing companies, as well as staff and management.

ASSIGNED DUTIES:

Calculate interest, charges, fees, etc.

Assist participants on changes on existing accounts (such as transferring funds from one account to another, changing allocations of monies among accounts, etc.)

Act as liaison for members to servicing companies.

May be required from time to time to place trades with the broker-dealer.

Assist a member in determining their investment objectives and to be able to direct them to the appropriate investments.

Sign forms and applications that require a registered representative's signature.

May make an unsolicited sale.

Service Representative III – Investments

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ASSIGNED DUTIES (continued):

Handle client questions; advise members regarding options on products and changes.

Process all necessary forms.

Establish and maintain appropriate files and records.

Utilize data processing equipment.

Perform other job related duties as assigned from time to time.

MINIMUM REQUIREMENTS:

Graduation from a standard high school or vocational school.

Must have or obtain within 6 months the following licenses – FINRA Series 6 and 63, State of Michigan Life and Variable. The first exam must be completed in the first sixty days of taking the position, the second exam completed in one hundred twenty days of taking the position, and the third exam in the one hundred and eighty days of taking the position.

Must be fingerprinted and pass FINRA Background check.

Experience and training which provide the following abilities, skills and knowledge:

- minimum of one year experience working in an investment company or equivalent experience or training which provides a basic understanding of product concepts and procedures.
- ability to keep complex records, to assemble, collect or organize data and prepare appropriate forms and records with speed and accuracy;
- ability to operate a personal computer and common office equipment;
- knowledge of basic business English, grammar, spelling and punctuation;
- ability to make arithmetical calculations rapidly and accurately;
- may require travel;
- ability to communicate tactfully, courteously and effectively.

TESTING:

Visual Speed & Accuracy: 80%

Computation: 80%