

## **EDUCATOR BENEFITS CORPORATION**

### **DIRECTOR OF OPERATIONS**

#### **OVERVIEW**

The Director of Operations will be responsible for day-to-day operations including: Performing of detail projects with numerical data both rapidly and accurately within the scope of the firm's registered Investment Advisor requirements and Accounting principles, preparing complex financial reports and analyzing transactions to detect and correct errors; and serving as a liaison with vendors, school systems and the Agent of Record regarding payment inquiries on data entry and accounts payable with payroll. The person in this position will interact with the Board of Directors.

#### **JOB QUALIFICATIONS AND REQUIREMENTS**

- Bachelor's degree in Business Administration, Accounting or Finance.
- Minimum of 5 (five) years of successful experience with accounting, business administration practices and functions. Experience must include database development for financial purposes, analyzing accounts and expenditures and resolving multiple problems relating to financial matters.
- Demonstrated successful experience in broad administrative and general office manager responsibilities.
- Excellent computer skills and proficiency in excel, word, outlook, access, spread sheet software and financial management software preferred (heavy computer usage).
- Exceptional communication skills (both oral and written) are a must for this position. Including the ability to listen, to communicate and relate to others on a personal and/or professional level.

#### **ESSENTIAL JOB DUTIES**

- Ability to shift priorities and demands while meeting critical deadlines.
- Process, post and deposit financial funds daily or as required.
- Reconcile monthly activity reports, i.e., bank/investment statements; generate financial reports on a monthly, quarterly and yearly basis and fulfilling tax related requirements.
- Assist the President and Board in creating the annual budget and monitor cash flow.
- Oversee payroll, employee benefits and organizational insurance.
- Assist the Chief Compliance Officer and independent auditors with any Alabama Securities Commission audits, examinations and/or inquiries, i.e., on site reviews or surprise audits.
- Disbursement of checks for operational and/or vendor expenditures.
- Remit to providers, school boards and individuals any premium refunds outstanding.
- Train, instruct and provide directions to the Benefits Assistant who will assist the Director of Operations.
- Monitor Commission payments and work with Educator Benefits Corporation (EBC's) Agent of Record and other providers to retrieve and ensure that all premiums are up-to-date when posted to incorrect accounts.

- Consult with the IT programmer to implement new applications as needed.
- Complete insurance questionnaires annually for insurance renewals/audits and compliance requirements.
- Keep the Business Manager of AEA informed of any pending issues with EBC.
- Schedules the site for EBC board meetings, draft the Agenda with the approval of the President of the EBC Board of Directors.
- Compiles the minutes, transfer the tentative minutes to the Board of Directors and prepares the packets for the meetings.
- Attend the Board meetings (occasional in-state travel).

#### **OTHER JOB DUTIES**

- Functions under the policies adopted by the EBC.
- Performs other duties as assigned.
- Assist and support the Chief Compliance Officer, the staff of Collateral Educators and the President of the EBC Board.

#### **WORKING CONDITIONS**

- The work hours may be extended beyond the normal standard hours.
- Use of a personal vehicle will be required.
- The selected candidate will be required to pass a background check.
- Valid Alabama driver's license required.
- Ability to perform moderate lifting.
- Ability to sit for long periods of time.

#### **SALARY AND BENEFITS**

- Competitive Salary
- 401(k) plan
- Dental and Vision Insurance
- Life Insurance
- Disability Insurance
- Medical insurance is reimbursed up to \$600/month (group medical insurance is not provided)