

## Tau Kappa Epsilon Job Description

<b>Job Title</b>	Finance/Risk Specialist I
<b>Business Line Description</b>	Finance and Risk
<b>Job Summary</b>	This position is responsible for oversight of assigned work to the finance and risk management group, assisting in the collections of accounts receivables, developing work out strategies for pre-charge off debt and other finance and insurance controls. Ensures own work, as well as others, is in compliance with established requirements.

<b>JOB SPECIFIC INFORMATION</b>	
Title	Finance/Risk Specialist I, II, III / Analyst I or II (DOE)
Reports To	Chief Financial Officer
Code	TBD
Grade	TBD
FLSA Status	Exempt
SAFE Act	No

Please list the job responsibilities in order of importance in the Depth and Scope area, and the job requirements in order of importance in the Education and Experience area, as **the first 5-8 bullets will be included in an external posting.**

<b>JOB REQUIREMENTS</b>	
Depth & Scope	<ul style="list-style-type: none"> <li>Conduct complex examinations of internal policies and procedures; perform all aspects of planning and reporting of examinations. Works with internal finance and audit groups on internal controls audit.</li> <li>Communicate effectively with internal and external stakeholders to ensure full understanding of financial and risk return tradeoffs. Present monthly, quarterly and annual updates to executive management attributing performance drivers as it relates to debt collections, risk matters (e.g. insurance, housing, collections, compliance, and internal controls)</li> <li>Monitor existing finance and risk programs, providing supervision and direct control of collections strategies and results.</li> <li>Moderate working knowledge of financial or statistical modeling (decision analytics), portfolio measures (risk rating systems), and enterprise reporting structures.</li> <li>Technical writer of policies and procedures that support the organizations risk aptitude</li> <li>Works independently but receives assistance/coaching from management.</li> <li>Performs testing procedures for the more critical areas of examinations</li> <li>May participate and/or lead assigned special projects</li> </ul>
Education & Experience	<ul style="list-style-type: none"> <li>4 year degree (preferred) or combination of education and equivalent experience</li> <li>2 to 4 years of related Business experience required, with emphasis in association risk management, compliance, and corporate reporting.</li> </ul>

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	<ul style="list-style-type: none"> <li>• Excellent oral and written communication skills</li> <li>• Strong knowledge of statistical formulation, audit and risk review principles and practices</li> <li>• Strong decision-making and follow through ability</li> <li>• PC skills (MS Office Suite)</li> <li>• Works well independently and with others</li> <li>• Strong Analytical skills</li> <li>• Ability to respond to shifting priorities quickly</li> <li>• Team working experience</li> <li>• Ability to build and maintain relationships with peers and management</li> <li>• Certification highly preferred or willingness to pursue certification</li> <li>• Travel less than 10%</li> </ul>
EEO Accountability	<p><u>EEO Code Description</u></p> <ul style="list-style-type: none"> <li>• Most jobs require bachelor and graduate degrees, and/or professional certification, or comparable experience.</li> <li>• This position does not have people management responsibilities.</li> </ul> <p><u>Customer Accountability</u></p> <ul style="list-style-type: none"> <li>• Understand and support the Fraternity’s value-based membership strategy.</li> <li>• Consider the impact of decisions on the well-being of TKE and stakeholders.</li> <li>• Provide the highest level of service when dealing with internal partners, vendors or our members.</li> <li>• Model quality service delivery at every interaction.</li> <li>• Lead and contribute to the ongoing improvement of the fraternal experience.</li> </ul> <p><u>Employee and Team Accountability</u></p> <ul style="list-style-type: none"> <li>• Be engaged in advancing and sustaining a unique, inclusive culture that reflects TKE’s diversity agenda, and create an extraordinary employee experience.</li> <li>• Participate fully as a member of the team and contribute to a positive work environment.</li> <li>• May provide leadership, training, and guidance to other team members.</li> <li>• Ensure ongoing communication with the team on the status / progress of projects and issues / points of interest.</li> <li>• Actively share information and knowledge, and proactively learn from the expertise of others.</li> </ul> <p><u>Community Accountability</u></p> <ul style="list-style-type: none"> <li>• Participate in civic activities to promote growth and development of the community and a positive image for TKE.</li> </ul> <p><u>Financial Accountability</u></p> <ul style="list-style-type: none"> <li>• Support the development and implementation of operational strategies and objectives to achieve measurable excellence in the overall enterprise strategy and objectives.</li> <li>• Participate in establishing and executing plans and goals for the Business to drive toward results.</li> </ul>

	<p><u>Business Operation Accountability</u></p> <ul style="list-style-type: none"><li>• Ensure that strategic initiatives and directives are carried out effectively with comprehensive change management strategies.</li><li>• Deliver business services, functions and capabilities that optimize the use of process, technology and our people, which take advantage of TKE's scale and operating model.</li><li>• Collaborate to ensure TKE is a best run, integrated, customer-focused, growth organization.</li><li>• Ensure processes, policies and procedures are designed in compliance with TKE's Risk Appetite.</li><li>• Successfully complete all required job specific, compliance-related training. Consult with all risk functions in the development and documentation of policies, procedures and controls, for all department processes.</li><li>• Ensure ongoing compliance with internal / external audit requirements. Provide prompt and comprehensive response to all external and internal audits requests and findings. Maintain appropriate records of action plans.</li></ul>
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*The above statements are intended to describe the general nature and level of work being performed by people assigned to this job. They are not intended to be an exhaustive list of all responsibilities, duties and skills required.*