

<b>NorthWest Plus Credit Union — Job Description</b>	
<b>Job Title: Financial Trainer</b>	
<b>Exempt:</b> E	<b>Salary Level:</b> DOE
<b>Division:</b> Operations	<b>Department:</b> Member Services
<b>Location:</b> Mount Vernon	
<b>Employee:</b>	
<b>Reports To:</b>	Associate Vice President Sales and Service
<b>Prepared By:</b>	
<b>Approved By:</b>	<b>Date Last Updated:</b>

### **SCOPE OF RESPONSIBILITIES:**

The primary function of this position is to assist the Credit Union in living out our Service Mission, “Always committed to enriching your financial life.” The primary responsibility of this position is to teach high school and college age students through the Northwest Career & Technical Academy. This person is responsible for organizing and implementing an instructional program that will result in students achieving academic success in accordance with the Career & Technical Academy’s academic requirements. This person will also provide financial training for credit union staff as time permits or when the academy is not in session.

### **FUNCTIONAL JOB REQUIREMENTS:**

- Plans for and guides the academic process to help students achieve program objectives
- Maintains a professional classroom atmosphere conducive to learning
- Willingness and ability to effectively communicate with students, parents, community and business partners
- Regular and predictable attendance is essential
- Strong financial and business math skills primarily in teller operations
- Knowledgeable in pc operations including a working knowledge of Word and Excel.
- Strong interest in teaching high school and college age students.

### **SPECIFIC RESPONSIBILITIES:**

- Responsible for exceptional service to every student, and staff member in alignment with our Service Promises.
  - I will always greet you and call you by name.
  - I will always treat you with respect and professionalism
  - I will always take ownership of your request
  - I will always listen to your needs and suggest information that will enrich your educational and financial life.
  - I will always thank you for doing business with us.

- Implements instructional activities that contribute to a climate where students are actively motivated and engaged in meaningful learning experiences for both the Northwest Career & Technical Academy and the Credit Union.
- Assists in assessing changing curricular needs and offers plans for improvement
- Communicates effectively, both orally and in writing with students, parents and other professionals on a regular basis.
- Engages in professional growth activities through an ongoing program of job-related knowledge and skill development and a willingness to keep apprised of changes within the financial industry (i.e., financial regulations, technology, etc.)
- Experience and willingness to bring Sales and Service training to the curriculum.
- Ability to work collaboratively to achieve the overall purposes of the school program.
- Other duties may be assigned.

### **TECHNICAL COMPETENCIES AND SKILLS**

- Possesses strong oral and written communications skills
- Works independently with little direct supervision
- Works as part of a team
- Accepts responsibility and is self-motivated
- Demonstrates strong work ethic to achieve academy goals
- Displays effective multi-tasking and time management skills

### **EDUCATION, CERTIFICATION, and WORK RELATED EXPERIENCE:**

- High school diploma required, Bachelors degree preferred.
- Three years documentable related work experience within the past five years, including 6,000 hours in the specific specialty/profession area of finance/banking or closely related field.
- Ability to obtain a Washington State Career & Technical Education Certificate.
- Completion of and clearance approved through the Washington State Patrol fingerprinting process
- Completion of and clearance approved through the Washington State background/character disclosure process

### **WORK ENVIRONMENT:**

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. NW Plus CU is an Equal Opportunity Employer. The Credit Union will provide reasonable accommodations to qualified individuals with disabilities to perform the essential functions.