

Financial Information Education Manager

SUMMARY:

Develops, interprets, and implements financial education concepts or techniques to provide financial education for staff, members and the credit union community.

Job Functions include: (Note: this is a representative list only - complete list provided with purchase)

- Maintains an extensive working knowledge of all the products and services the credit union offers to its members. Catalogues this knowledge into informational material, and creates a library for staff and members to use for further information.
- Develops a curriculum of lesson plans for training the staff on financial planning areas, 401k/403b educational requirements, and all applicable governmental legislation that goes with financial planning.
- Develops a second curriculum of lesson plans for training the staff on educating the members about financial planning. Such as retirement planning, investment options, education planning and understanding the credit union services
- Coordinates the research and review of all current issues and legislation concerning credit unions and relevant financial matters. Conducts special studies to analyze complex financial actions and prepare recommendations for policy, procedure, control, or action.

(also details Supervisory Responsibilities, Qualifications, Education and/or Experience, Language Skills, and work environment)