

Job Title	Sr Investment Officer
Short Description	Administer Credit Union ALM processes, including ERM. Deliver investment analysis and modeling. Make investment recommendations to the VP of Strategy and Investments.
Full Description	<p>Role:</p> <p>Administer Credit Union ALM processes, including ERM. Deliver investment analysis and modeling. Make investment recommendations to the VP of Strategy and Investments.</p> <p>Essential Functions & Responsibilities:</p> <p>E 25% Support and work closely with the VP of Strategy and Investments to manage investment activities in accordance with policies established by the board of directors.</p> <p>E 25% Manage the ALM model, including maintaining the integrity of data, assumptions, and results of the C. Myers software.</p> <p>E 10% Manage the investment portfolio using eFolio, including maintaining the accuracy of data, such as safekeeping location.</p> <p>E 10% Maintain the ERM system for the department and identify new risks as they arise</p> <p>E 10% Serve as department lead for all audits, exams, and CU objectives related to Investments and ALM.</p> <p>E 5% Responsible for managing, through a 3rd party vendor, ALM model validations</p> <p>E 5% Work with Accounting & Finance Manager to test LOCs yearly</p> <p>E 5% Stay abreast of all regulatory changes involving investments and ALM</p> <p>N 5% Performs other job related duties as assigned.</p> <p>Performance Measurements:</p> <ol style="list-style-type: none">1. Demonstrate ability to create a cohesive investment strategy to generate additional returns for the Credit Union.2. Demonstrate ability to succeed under stressful conditions and tight deadlines.3. Maintain and demonstrate knowledge within the legal, regulatory, economic, competitive, and technology environments which may affect various ALM and Investment activities

4. Prepare and deliver requested reports which are timely and accurate.

5. Demonstrate behaviors consistent with the Pen Air Core Values.

6. Regular reliable attendance.

Knowledge and Skills:

Experience Five years to eight years of similar or related experience, preferably in the investment banking industry.

Education (1) A bachelor's degree, or (2) achievement of formal certifications recognized in the industry as equivalent to a bachelor's degree (e.g. information technology certifications in lieu of a degree). Candidates with an MBA or any level of CFA completed preferred

Interpersonal Skills Work involves much personal contact with others inside and/or outside the organization for the purpose of first-level conflict resolution, building relationships, and soliciting cooperation. Discussions involve a higher degree of confidentiality and discretion, requiring diplomacy and tact in communication.

Other Skills 1. Intermediate level understanding of the Bloomberg Terminal and how to analyze investments pre-purchase
2. Knowledge of spreadsheet software applications
3. Knowledge of Raymond James' eFolio software
4. Ability to communicate clearly and concisely, both orally and in writing.

Physical Requirements Light or low amount of physical exertion

Work Environment No adverse environmental working conditions noted.

This Job Description is not a complete statement of all duties and responsibilities comprising the position.

Education

(1) A bachelor's degree, or (2) achievement of formal certifications recognized in the industry as equivalent to a bachelor's degree (e.g. information technology certifications in lieu of a degree). Candidates with an MBA or any level of CFA completed preferred

Additional Comments

Credit Union	Pen Air FCU
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Expiration Date	03/31/2022