FINANCIAL PLANNING COORDINATOR

Position Description

Summary
The Financial Planning Coordinator provides high level customer service in the area of financial and technical expertise for students in conjunction with campus enrollment to meet institutional goals and objectives for National American University in accordance with the mission, core values, and purposes of the university.

Minimum Qualifications
The Financial Planning Coordinator must satisfy the following minimum qualifications:
1. Associate’s degree or equivalent combination of education and/or experience required; and,
2. One-year prior financial aid experience with strong accounting background preferred; and,
3. Customer service experience preferred; and,
4. Ability to successfully pass a background check including being in good standing (not in default or overpayment) on all Title IV funds.

Skills and Attributes
The Financial Planning Coordinator possess the following skills and attributes: solid typing and ten-key skills; ability to solve basic problems and/or situations; excellent attention to detail and follow up; ability to comprehend basic information; proven math and/or accounting skills; excellent customer service and communication skills; computer experience required particularly in Microsoft Excel and Word.

Essential Functions
The Financial Planning Coordinator performs the following essential functions:
1. Assist students in applying for Federal Student Aid Programs and/or other programs and provides students with a comprehensive estimate of their individual financial plan.
2. Work in a team centered environment with system financial services, campus management and enrollment advisors.
3. Counsels and assists students in handling their school finances by obtaining signatures on all necessary forms, utilizing Contact Manager as a daily tickler system and documentation of finance activity and results of follow up. Collects required student documents utilizing phone contact, email, regular mail, blocking from class, etc. Processes and completes the finance portion of the registration procedure.
4. Assists with the verification process by collecting verification documents, ensures all appropriate signatures are obtained, collects verification worksheets, tax returns and W-2’s if applicable and secures dependency documentation, if applicable.
5. Assists students with loan entrance counseling, as applicable.
6. Reviews, daily, all new and re-entry accounts to ensure posting of appropriate charges and financial aid payments.
7. Prepares and updates collection report(s) with collections and financial aid information and participates in weekly accountability calls and campus meetings as necessary.
8. Completes, distributes and collects signed federal work study authorization forms, if applicable.
9. Counsels on and collects payment plans to resolve any balances owed.
10. Assist students with understanding the payment of military benefits, company tuition assistance benefits and other outside resources.
11. Reviews NSLDS (National Student Loan Data System) to ensure proper financial aid awarding.
12. Prepares the FA checklist and reviews the student’s financial aid documents and forwards on to central financial aid.
13. Contacts students selected for verification and follows up with the students to help them complete the verification process.
14. Reviews FA checklist to ensure all required documents are received and completed properly.
15. Documents within university’s database, contact manager, with all proper financial aid activity and results of follow up.
16. Attends state/local financial aid meetings upon request.
17. Maintains availability to travel to all university campuses for training and assistance.
18. Ensures that the financial packaging process is completed each quarter for new and re-entry students, future and current as assigned.
19. Ensures that student aid packaging/processing guidelines are in compliance with federal, state and institutional rules and regulations.
20. General understanding of the awarding and verification process to better support the student.
21. Performs other duties as assigned.

**Required Work Hours**

Forty hours per week during daytime, evening, and weekend hours. Scheduled work shifts will be between the hours of 6:00 a.m. and 7:00 p.m. and may change. Overtime may be required, or permitted with prior approval.

**Reporting and Supervisory Responsibilities**

1. The Financial Planning Coordinator reports to the Director of Enrollment Financial Services.
2. This position has no supervisory responsibilities.

**Physical Requirements**

The Financial Planning Coordinator must be able to speak, hear, see, write, read, type, dial, reach, and bend.

**Travel**

Periodic travel, including airline travel and overnight stays, may be required.

**Classification**

1. FLSA: Nonexempt
2. IPEDS: Community Service, Legal, Arts and Media

*Note: This position description does not list every activity, duty, and responsibility of the position and may be altered by the university at any time.*

I have read and understand the foregoing position description, and I acknowledge and accept the responsibilities of the Financial Planning Coordinator.