



Job Description

Job Title: Financial Services Advisor

Summary: The Financial Services Advisor meets with applicants and students regarding their eligibility for federal financial aid programs by calculating anticipated awards in PELL, SEOG, Stafford/Direct and supplementary loans, and other Title IV and non -Title IV programs. The SFA packages and awards all Title IV and non-Title IV aid for each academic year and enters this in the Student Information Systems as required. All work is performed within the established governmental regulations and institutional procedures. A high level of ethics is required in the counseling of students.

Essential Duties and Responsibilities:

- Provide an overview of the Financial Aid process and programs available to qualifying students.
- Perform estimates and calculations as it relates to Tuition and Financial Aid based on a student's unique eligibility.
- Counsel students regarding financial aid paperwork, award information, and options for covering educational expenses.
- Creates and schedules funding plans for enrolled students.
- Evaluate all submitted Financial Aid documentation and determine additional requirements.
- Deliver the highest level of service and experience to students and co-workers while maintaining performance metrics.
- Track students' progress and reviews changes to Financial Aid eligibility throughout the program.
- Performs required document tracking for drops, terminations, and graduates including R2T4, PWD, and loan exit materials.
- Enhance the financial literacy of our students and graduates to ensure professional success.
- Uphold Title IV, state, military, VA and institutional knowledge and compliance.

Supervisory Responsibilities: This job has no supervisory responsibilities.

Competency: To perform the job successfully, an individual should demonstrate the following competencies:

Content Specific Knowledge- Understands the fundamentals, skills, methods and procedures within their area of expertise and instructional practice.

Customer Focus- Personally demonstrates that external or internal customers are a high priority; identifies customer needs and expectations and responds to them in a timely and effective manner; anticipates and prevents delays or other things that can adversely affect the customer; keeps customer informed about the status of pending actions and inquiries about customer satisfaction with products or services.

Productivity- Meets or exceeds productivity standards that have been established for organizational level or position; has successfully combined skills, ability and effort level to ensure that expectations related to results/output are achieved.

Quality of Work- Has established a track record of producing work that is highly accurate, demonstrates attention to detail, and reflects well on the organization; is personally committed to high quality work and encourages others to have similar standards.

Qualifications:

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. Below are the minimum requirements of the education, experience, knowledge, and skills required to competently perform in this position. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Bachelor's degree preferred
- Must qualify for Professional Access to the National Student Loan Data System (NSLDS)
- Two plus years related financial advising and/or training experience preferred
- PC skills in Microsoft Office, Internet applications and database software.
- Experience with Student Financial Aid software application a plus.
- Excellent oral and written communication skills.
- Must be a self-starter with the ability to multi-task.

Physical Demands: The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is regularly required to sit; stand, walk, use hands to finger, handle, or feel; talk and hear. The employee is frequently required to reach with hands and arms. The employee is occasionally required to climb or balance and stoop, kneel, crouch, or crawl. The employee may occasionally lift and/or move up to 10 pounds.

Work Environment: The work environment characteristics described here are representative of an office environment with cubicles. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. The noise level in the work environment is usually quiet.