Position: Compliance and Strategy Specialist

Reports to: Director of Operations

Salary: Commensurate with experience

Status: Regular Full-time

Location: Keshena, WI – hybrid-remote

Posting Closes – July 21st, 2023

Description:

The Compliance and Strategy Specialist will be responsible for the overall status of portfolios and assist in gathering and creating proper documents and/or reports for compliance purposes. This position will help assist clients as needed to prevent delinquent statuses.

Essential Duties:

- Design and develop needed guidelines and tools for delinquency and compliance processes.
- Track outstanding debts and plan course of actions to recover owed money.
- Locate and contact debtors on a regular scheduled basis.
- Write letters, memos, emails, or other correspondence as needed.
- Negotiate payoff deadlines and payment plans.
- Facilitate post-closing communication and relationships with clients.
- Update account status and database on a regular basis.
- Oversee and coordinate legal action as needed; and in some circumstances will represent the company if needed.
- Identify post-close Technical Assistance needs.
- Develop procedures and guidelines for grant reporting.
- Track growth and development of clients for reporting purposes.
- Monitor grant funds and obligations to ensure compliance with grants.
- Submit required reports with grant funders as required by grants.
- Assist in finding additional funding sources for the company.
- Other duties as assigned.

Minimum Qualifications:

Associate degree in business or closely related field.

Three years' experience of compliance and collections related work.

Legal or Para-legal experience preferred but not required.

A valid driver's license, with reliable transportation and automobile insurance.
Experience with Microsoft Office to include Word, Excel, Outlook, and PowerPoint, accounting software i.e., QuickBooks, and loan portfolio software.

An equivalent amount of experience and/or education may be considered.

Other Skills, Knowledge, and Abilities:

- Strong written and verbal communication skills
- Experience in administration/office management
- High ethical and professional standards
- Strong sense of confidentiality
- Attention to detail
- Strong problem-solving skills
- Abilities to efficiently manage multiple projects with accuracy
- Self-motivated with the ability to work independently

* Native American preference in hiring.

Woodland Financial Partners, Inc. is a non-profit 501(c)(3) Native Community Development Financial Institution revolving loan fund. Woodland Financial Partners Inc. provides affordable loans and financial education to Native communities located in the mid-western region of Wisconsin.

If interested in applying, please send an email by July 21, 2023, to kwayka@woodlandfinancial.org with the following information:

- Interest Letter
- Resume
- Any relevant documentation that supports meeting the minimum qualifications

If claiming Native American preference – copy of Tribal Identification card or CIB.

Woodland Financial Partners Inc. is an equal opportunity employer and abides by all state and federal laws.