**Job Description**

**Job Title:** Personal Financial Counselor  
**Position #:** 207  
**Location:** Main Location  
**Reports to:** Director of Financial Services

<table>
<thead>
<tr>
<th>Position Type:</th>
<th>FLSA Status:</th>
<th>Hours worked Per Week:</th>
</tr>
</thead>
<tbody>
<tr>
<td>✕ Full-time</td>
<td>✕ Exempt</td>
<td>Approximately 40</td>
</tr>
<tr>
<td>□ Part-time</td>
<td>□ Non-Exempt</td>
<td></td>
</tr>
<tr>
<td>□ Student Worker</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**POSITION SUMMARY:**
Counsels students regarding the financial aid process and payment programs. Responsible of financial aid awarding. Performs various functions to insure accuracy and compliance with federal, state and institutional regulations, policies and procedures.

**ESSENTIAL DUTIES AND RESPONSIBILITIES:**

- Assesses an individual student's financial need and ascertains the student's eligibility to participate in federal, state and/or institutional aid programs
- Provides counseling to students on the manner of integrating their financial concerns, relative to personal and educational goals
- Requests, collects and reviews required documents from students and parents necessary for verification and compliance in a timely manner.
- Works with students/parents to develop individual payment plans consistent with Institutional requirements.
- Responsible for completeness and accuracy of student financial aid records in accordance with federal, state and institutional regulations/policies.
- Instrumental in resolving unexpected or unforeseen financial issues for students.
- Work to remove financial barriers for students so they can achieve their educational goals.
- Expected to make recommendations regarding operations, policies and processes to achieve continual improvement and efficiency.
- Provides input to Scholarship Committee regarding private scholarship awards.
- Other duties as assigned.

**QUALIFICATIONS:**
To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

**EDUCATION and/or EXPERIENCE:**
Bachelor's degree (B. A.) from four-year college or university; or one to two years related experience and/or training; or equivalent combination of education and experience.

**OTHER SKILLS AND ABILITIES:**
Knowledge of government, donor and/or institutional rules, regulations, and guidelines, and procedures for awarding financial aid. Ability to communicate effectively.

**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.

**WORK ENVIRONMENT:**
The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.