

**Position:** FINANCIAL SERVICES SPECIALIST  
**Hiring Organization:** United Way of Salt Lake  
Salt Lake City, UT  
**Department:** Financial Services  
**Reports to:** FINANCIAL SERVICES DIRECTOR  
[www.uw.org](http://www.uw.org)

### **ORGANIZATION BACKGROUND AND EVOLUTION**

United Way of Salt Lake (UWSL) has made a promise to our community – to change the odds so all children and their families have the same chance to succeed in school and life. Our role has evolved from primarily a fund-raising, fund distribution organization to what it is today - a community problem-solving organization, dedicated to advancing the education, income and health of our neighborhoods and communities to ensure that every child succeeds, every step of the way, from cradle to career.

UWSL has adopted a unique approach to community problem-solving called Collective Impact. Collective Impact brings many different sectors together to find new and innovative ways to address challenges and develop lasting changes.

UWSL is committed to excellence. We have adopted high standards of accountability and operate with integrity and transparency. We provide outstanding customer service.

### **WORK ENVIRONMENT**

UWSL's work environment is fast-paced, friendly, committed, nonpartisan, and ever changing. Employees are dedicated, appreciated and recognized for their efforts, and all levels of personnel are engaged in the work daily. We offer competitive wages and a generous, comprehensive benefit package. Our focus is on high level results – communicating, aligning and integrating around our organizational goals.

### **POSITION OVERVIEW**

The Financial Services Specialist works under the direction of the Financial Services Director: performs data entry, data processing, online pledge processing, agency payouts, thank you letters, patriot act compliance documentation, customer service, and coordinates with others to obtain and maintain accurate records.

### **KEY RESPONSIBILITIES**

1. Data entry – process corporate and individual pledge forms in UWSL's database
2. Set up and process electronic campaign sites – oversee and process all electronic workplace campaigns. Must maintain accurate reports of all online campaigns
3. Thank you post cards –generate and pull lists for thank you post card mailings
4. Payouts – generate reports, import data, and mail checks to agencies on a quarterly basis. Track agency IRS status with each payout, mailing Patriot Act Compliance forms when necessary. Must maintain accurate filing of records and forms
5. Intake and mail –responsible for the intake of all workplace campaigns from Community Investment Advisors. Sign off on reports and create/take deposits for any cash/checks received. Open incoming mail daily with the receptionist

7. Customer service – respond to questions/comments from donors or agencies via email or telephone; work closely with Employee Campaign Managers during online workplace campaigns, etc.

8. Perform other duties as assigned

**POSITION REQUIREMENTS**

Must have a friendly, professional appearance. Intermediate Microsoft Office skills a must. Excellent verbal and written communication skills. Highly organized and extremely detail-oriented. Able to manage complex, customer-oriented database system. Must have exceptional customer service skills.

**SALARY INFORMATION**

\$15 - \$18 per hour depending on experience.

**TO APPLY**

Only complete applications will be considered for the position. Interested applicants should submit a cover letter, resume, and employment application to [jobs@uw.org](mailto:jobs@uw.org). Employment applications and the complete job description can be found at <http://www.uw.org/about-us/careers/>.