



POSITION:	ACCOUNT MANAGER	PROGRAM:	LOANS
REPORTS TO:	LOANS MANAGER	EFFECTIVE DATE:	JULY 25, 2012
WAGE BAND:	3	REVISED DATE:	
STEP RANGE:	\$38,538 - \$48,782	APPROVED BY:	

SUMMARY:

The Account Manager is responsible for promoting NADF services and delivering NADF loans program services to assigned clients.

ACCOUNTABILITY:

The Account Manager is supervised by and is directly accountable to the Loans Manager.

DUTIES AND RESPONSIBILITIES:

1. Liaises with clients and potential clients.
 - a) Provides information on NADF services and processes.
 - b) Provides general guidance to the client for what is required in a business plan.
 - c) Refers clients to business support staff for assistance in developing their business plan.
 - d) Visits clients as required within budget constraints.
 - e) Promotes all services provided by NADF during community visits.

2. Reviews and analyzes Statements of Intent and business proposals and monitors funded projects.
 - a) Reviews Statements of Intent as assigned by the Loans Manager and provides written response to the client according to approved timelines.
 - b) Reviews, analyzes and summarizes business proposals as assigned providing a clear indication of the pros and cons, and providing a recommendation on approval of the project.
 - c) Reviews annual financial statements provided by the client and/or examines the books and records of financed projects during scheduled visits and after analyzing requests additional clarification as necessary.
 - d) Meets with the loans and business support team, and Board or Board Committee if requested, and reviews assigned projects as necessary.
 - e) Monitors funded projects as assigned through direct contact, analysis of annual financial information, and from reliable third party sources if needed, and records the observations in the comments section of the loans management system.
 - f) Follows-up as often as necessary on assigned accounts in arrears in order to achieve positive results and reports the results to follow-up on the arrears to Loans Manager on a regular basis (no less often than monthly).
 - g) Prepares documentation for accounts in default which are to be sent to collections; continues to monitor loans already written off and initiates avenues to collect (eg small claims court).

3. Liaises with First Nations, agencies and organizations and any reasonable information source as required.



4. Prepares documentation for approved projects as assigned and maintains up-to-date information in established NADF information systems.
 - a) Prepares and maintains all documentation for approved projects that are assigned, organizes the file according to approved procedure and arranges/monitors any necessary registrations of security.
 - b) Maintains up-to-date information in the loan management system including mailing addresses, phone numbers, general project information and contacts.
 - c) Maintains up-to-date data on the loans continuity sheet in Excel.
 - d) Logs and maintains security in the loans management system, selecting a date for reminders with sufficient lead time to allow for proper renewals and follow up to obtain current security items.
5. Attends internal or external meetings as required.
6. Other duties as assigned and requested by the Loans Manager or designate.

STANDARDS OF PERFORMANCE:

1. Works productively and professionally as a member of the NADF's team and maintains co-operative working relationships with all NADF staff and with partners, agencies and clients.
2. Maintains the strictest of confidence with regards to NADF clients, their files or other dealings, and with all personnel and other confidential internal records and proceedings.
3. Assigned duties and responsibilities are carried out in a professional and timely manner in cooperation with management and staff as per policies and procedures.
4. Completes all reports and submissions on time and in a professional manner; all information on Loan Management System is kept current to within a week of communication with the client.
5. Demonstrates time management (attendance and punctual) and the ability to prioritize workload efficiently and effectively.
6. Willing to acquire new skills and knowledge required to fulfill duties and responsibilities and sees learning and development as part of the job.
7. Adheres to NADF policies and procedures.
8. Develops and implements a detailed work plan with time-based objectives and results that are concrete, specific and measurable.
9. Shows good judgment about when to take the initiative and when to obtain direction from their manager.
10. Works effectively and efficiently with a minimum of supervision
11. Knowledge of and commitment to the mandate and services provided by NADF.
12. Knowledge of the people, culture, history of Nishnawbe Aski Nation; in-depth knowledge of the economic climate and business development priorities of regional Aboriginals.
13. Ability to speak Cree, Oji-Cree, or Ojibway would be considered an asset.
14. Must be willing and able to travel by air and road to remote and rural northern communities.
15. Must have a valid driver's license, reliable vehicle and the required vehicle insurance as set out in the Employee Personnel Policy.

QUALIFICATIONS:

1. A post-secondary diploma or degree in Business and/or Accounting with a minimum of three (3) years business



- experience. A designation would be considered an asset.
2. Excellent written and verbal communication skills including demonstrated ability to write reports and proposals; and presentations.
 3. Strong financial analysis and business assessment skills.
 4. Strong public relations skills.
 5. Strong influencing skills with the ability to develop and motivate team members and negotiate with representatives from other areas within the organization.
 6. Excellent planning and organization skills with the ability to work independently and prioritize to meet deadlines.
 7. Strong problem identification and problem solving skills
 8. Comprehensive understanding and/or contacts within economic sectors so as to have current knowledge of the challenges and opportunities facing entrepreneurs.
 9. In-depth knowledge of the economic climate and business development priorities of the Aboriginals communities in the Nishnawbe Aski Nation (“NAN”) territory.
 10. Experience working within Aboriginal communities, members or with Aboriginal clients.
 11. Excellent knowledge and experience using word processing and spreadsheet programs an asset; experience with Microsoft Word and Excel programs is preferred.
 12. Experience in on-site training would be considered an asset.