

**PENSION FUND OF THE CHRISTIAN CHURCH**  
**JOB OPPORTUNITY: VICE PRESIDENT FOR CLIENT RELATIONS**

*Join our Team to Ensure the Growth of \$2.9 Billion in Assets  
And Serve our 12,600+ Members who Serve Others*

Pension Fund of the Christian Church is seeking an entrepreneurial and mission-minded team member to join our team as **Vice President for Client Relations**, who will direct and develop all of Pension Fund's external employer and customer relations efforts, while also being responsible for sales of retirement products and services across our nationwide network. This newly created position is based in a major metropolitan area or at headquarters in Indianapolis, Indiana.

For the right candidate, this position will create the opportunity to work in a personally fulfilling environment while being part of a purpose-driven organization that works to secure the financial futures of our 12,600+ members who serve others.

## **BACKGROUND**

Pension Fund currently has assets in excess of \$2.9 Billion. In service to our members, Pension Fund partners with employers to:

- Offer financially secure retirement savings options and education for pastors and lay employees of the Stone-Campbell movement, including financial support of surviving family members and provisions for those who become disabled;
- Invest and manage prudently the resources of our members - maximizing returns, minimizing costs and assuming the burden of market risk;
- Engage members with compassionate care and personalized attention;
- Steward the assets and programs of Ministerial Relief and Assistance; and
- Utilize current and compliant processes.

Our products include a defined benefit pension with death and disability benefits; a 403b tax-deferred account (TD); Roth IRA; Traditional IRA; Benefit Accumulation Account (BA) (similar to a money market account); and Medicare Supplemental plans. We are one of over a hundred IRS approved non-bank trustees in the US.

Pension Fund members are part of the Stone-Campbell movement including but not limited to the Christian Church (Disciples of Christ), Christian Churches and Church of Christ, Church of Christ / Disciples of Christ International, and Churches of Christ (acapella) in the United States. We operate a Retirement Contribution Account (RCA) plan in Canada and a Pension Plan in Puerto Rico.

## **APPROACH**

Everyday when they wake up, our ideal candidate will be inspired to be part of a customer-focused, entrepreneurial, and results-driven team. They will also find inspiration in the hard work our organization does to ensure financially secure retirement plans for our members in congregations, the international mission field, institutions of higher education, benevolent care facilities, and other expressions of the movement.

This individual will lead the efforts to establish new employer relationships, sell Pension Fund's products to the employers and their employees, cross-sell products to established members, and provide outstanding customer service to our established members and employers.

Team management will be crucial for success in this role; Pension Fund is also currently hiring at least four new Area Directors to report to the Vice President for Client Relations.

## **OBJECTIVES**

Reporting to the Chief Marketing Officer and Senior Vice President of Client Relations, the Vice President will motivate a team of Area Directors who will build relationships within the Stone-Campbell movement to sell retirement products and services. They will ensure that their team achieves the following:

- Reach or exceed sales goals individually and for their geographic region;
- Develop new employer relationships and add additional employees to established relationships;
- Identify and track high potential relationships, including existing and potential members;
- Cross-sell additional products to existing employers and members;
- Provide the highest level of customer service and satisfaction;
- Coordinate the presence of Pension Fund at ministry-related events within the territory, inviting senior management to be present as appropriate;
- Work with the operations team to onboard new members and employers;
- Work with the Vice President for Customer Advocacy to resolve member concerns;
- Develop plan agreements between Pension Fund and employers, ensuring compliance with Pension Fund's plan documents and the regulatory environment of church plans;
- Work closely with marketing to establish successful support and partner programs; and
- Be a model for the customer-oriented and team-oriented culture.

## **QUALIFICATIONS**

The successful candidate will:

- Be ordained clergy or have a BA degree in a business-related field;
- Have an MBA, MBM, MA, or MPP, with a focus on banking, investments, or sales;
- Have 5-10 years of professional experience in banking, investments, or sales;
- Demonstrate an understanding of work within an associational system and a working knowledge of the Stone-Campbell movement and/or Christian Church (Disciples of Christ) and Pension Fund;
- Possess clear professional strengths to organize, motivate, and lead the work of others;
- Be outstanding at interpersonal and written/verbal communication skills;
- Work smoothly and consistently in a remote work setting with a geographically dispersed team;
- Serve as a team player who excels working in small, cohesive groups.

The successful candidate will be entrepreneurial yet mission-minded. They will see the health of the customer community as their primary goal, and to achieve this, they will be detail-oriented, a self-starter, and excellent at time management. They will be comfortable working with and building teams in an environment of diverse experience, skill-sets and working styles.

They will be able to lead a team of hard-working professionals through both imminent and long-term challenges, be truly outstanding at interpersonal and written/verbal communication skills, and be a coach who can create avenues for professional growth, team-wide, in a diverse setting. They will be comfortable with new systems and technologies. Successful candidates should understand the unique relational dynamics of working in a church-related, non-profit organization. Preference will be given to candidates with knowledge of the polity of the Stone-Campbell movement.

Travel for in-person meetings with customers and partners will be essential for success in this role, with approximately 50% travel required.

## **SALARY & BENEFITS**

Pension Fund of the Christian Church offers a highly competitive salary along with the following benefits:

- A generous base salary;
- Goal-oriented variable compensation with no earnings cap;
- 14% of base salary to our pension plan;
- A generous healthcare stipend based on family status as of January 1;

- Full family coverage on dental, as appropriate;
- Two times annual salary up to \$500,000 in our group term life policy;
- Full vacation benefits;
- A matching tax deferred retirement account;
- Educational assistance up to the maximum allowed by the IRS as nontaxable income; and,
- A family-oriented office environment with flexible work schedules.

Interested and qualified candidates should submit a resume and cover letter to Dawn Fleming, Assistant Vice President for Operations, via e-mail [dmfleming@pensionfund.org](mailto:dmfleming@pensionfund.org). Candidates will be reviewed on a rolling basis and applications will remain open until the positions are filled.

*Pension Fund does not discriminate in employment opportunities or practices on the basis of race, color, religion, sex, national origin, handicap, age, sexual orientation, status as a parent, or any other characteristic protected by law.*

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**Our mission is** *For the Support of Ministry.*<sup>1</sup>

**Our Vision** is that *Stone-Campbell pastors and lay employees will enjoy a Strong...Smart...and Secure retirement.*

**Core Values:** Integrity, Security, and Compassion

**Integrity:** the quality of being honest, making membership-oriented decisions

**Security:** the state of stability, providing freedom from worry or fear

**Compassion:** the ability to help others in times of need or distress

To learn more about us visit: <http://www.pensionfund.org/about>

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<sup>1</sup> Referencing Alexander Campbell's call to the Church in 1830 for contributions in support of the gospel and missionary labor to ensure care of the aged. P.16 "For the Support of Ministry."