

IMMEDIATE POSITION OPENING

02/21/2025

Title: Financial Planning Advisor

(Full-Time, Exempt Position)

Geneva's Financial Planning Advisor guides participants, churches, and other organizations toward wellbeing through financial and retirement goals. The Financial Planning Advisor is an expert in ministerial call packages, personal finance, retirement planning, and Geneva's insurance products. The Financial Planning Advisor empathizes and effectively communicates with participants, regardless of their prior financial knowledge. The Financial Planning Advisor engages each conversation with a participant's overall wellbeing in mind.

Please see the **Job Description** for more detailed information.

PLEASE DIRECT INQUIRIES/RESUMES TO:

Geneva Benefits Group
ATTN: Heather Chambliss
1700 N. Brown Road, Ste 106
Lawrenceville, Georgia 30043
Email: heather.chambliss@genevabenefits.org

Applicants must complete or affirm the following (by checking each box and returning a copy of this page):

- ☐ Cover Letter Included
- ☐ Resume Included
- ☐ In Agreement with Geneva's Employer Statement (see below)
- ☐ In Agreement with Geneva's Statement of Faith (see attached)

Employer Statement

Geneva Benefits Group not discriminate against any person on the basis of race, color, gender, national origin, age, disability, or veteran status, whether in hiring, promotion, pay, or benefit decisions. Nevertheless, as a Christian ministry, Geneva reserves the right to hire only those individuals who make a credible profession of faith in Jesus Christ and who demonstrate qualifications for the position being filled. While as a church entity, Geneva is not subject to the Americans with Disabilities Act, Geneva does not discriminate against any qualified individuals with a disability. Geneva will make reasonable accommodations to allow a disabled employee to perform the essential functions of his or her job whenever possible. It is the responsibility of the disabled employee to request an accommodation of his or her physical or mental disability by contacting his or her supervisor.

About Geneva Benefits Group

As an agency of the Presbyterian Church in America (PCA), the role of Geneva Benefits Group is to “Prepare, Protect, and Nurture” ministers, missionaries, lay employees, and their employing ministries through the provision of employee benefits, financial consultation and counseling. This is accomplished through providing the benefits and educating eligible PCA ministry partners about them. The benefits include the plans, programs and services provided through Geneva, including the PCA 403(b) Retirement Plan, PCA Group Insurance Plans, the Geneva Relief Fund program, and the counseling ministries of ServantCare and Cherish.

Our Vision

We believe the gospel advances and the church thrives as men and women who serve PCA ministries grow spiritually and financially healthy.

Our Values

We Know You: We Understand Ministry Life

We Know How: We Continuously Pursue Excellence

We Care: Relationships Are Our Bottom Line

Our Mission Statement

We guide PCA pastors and ministry workers through the complexities of financial planning and employee benefits, so they and their families are able to live generously in every season of ministry.

Job Description Financial Planning Advisor



Job Title	Department	Reports to	FLSA Status	Date Created
Financial Planning Advisor	Retirement Readiness	Director of Retirement Readiness	Exempt	02/01/2021

Summary

Geneva's Financial Planning Advisor guides participants, churches, and other organizations toward wellbeing through financial and retirement goals. The Financial Planning Advisor is an expert in ministerial call packages, personal finance, retirement planning, and Geneva's insurance products. The Financial Planning Advisor empathizes and effectively communicates with participants, regardless of their prior financial knowledge. The Financial Planning Advisor engages each conversation with a participant's overall wellbeing in mind.

Responsibilities

- Consult with participants (and spouses) to evaluate an existing or proposed call package.
- Consult with participants for financial guidance and retirement planning.
- Consult with sessions, finance teams, and organizational leaders to evaluate and improve staff compensation and benefits through a healthy call package.
- Build relationships with key influencers in the organizations that we support.
- Understand and communicate the advantages of Geneva's 403b(9); particularly in relation to ministerial tax issues.
- Teach financial and retirement seminars for churches, seminaries, and like-minded organizations.
- Develop competency by participating in meetings with investment professionals.
- Be a team player with the Retirement Readiness team, seeking ways to better serve participants and expand the reach of Geneva.
- Complete coursework required to become a CFP® (CERTIFIED FINANCIAL PLANNER™).
- Maintain education and activities relevant to the ministry of an ordained minister of the gospel.
- Seek the wellbeing of churches, organizations, and participants.

Qualifications

Faith

- Devotion to Jesus Christ, holiness, and a passion to make him known.
- A Christian whose life reflects mature spiritual growth as evidenced by the fruit of the Spirit and knowledge of the basics of the faith.
- Active member of an evangelical church that affirms the tenants of historic Christianity (PCA church preferred but not required).
- In agreement with Geneva's Statement of Faith and Code of Conduct.

This Section to be Updated by HR Department Only

Title JD – Financial Planning Advisor
Author D Aldin
Dept Owner Retirement Readiness
Approved by ELT

Doc Number HR-JD-022
Creation Date 02/01/2021
Review Date 02/19/2025
Last Revised Date 02/19/2025

Job Description Financial Planning Advisor



Personal

- Passion for the church and the ministry leaders.
- Ability to form and maintain solid relationships with church leaders quickly and easily.
- Excellent oral and written communication skills.
- Strong analytical and problem-solving skills.
- Self-motivated to meet deadlines and achieve goals.
- Committed lifelong learner.
- Collaborative skills in order to work well with other Geneva associates and other PCA committees and agencies.
- Persevere in a challenging business and ministry environments.

Professional

- PCA Teaching Elder in good standing with presbytery.
- At least five years of ministerial experience.
- Ongoing participation in continuing education in relevant disciplines and skills.
- Competent with Office 365 Products; able to learn additional software packages.
- Completion (or working towards) the CFP® (CERTIFIED FINANCIAL PLANNER™) certification.

Location

Geneva's offices are located in Lawrenceville, Georgia. This is an in-office position. Remote work is not an option.

Travel Requirements

Significant travel to support the work will be required.

Working Conditions

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. The noise, temperature, and comfort level in the work environment is usually moderate.

Other

This job description in no way states or implies that these are the only duties to be performed by the employee(s) incumbent in this position. Employee(s) will be required to follow any other job-related instructions and to perform any other job-related duties requested by any person authorized to give instructions or assignments. This document does not create an employment contract, implied or otherwise, other than an "at will" relationship.

This Section to be Updated by HR Department Only

Title	JD – Financial Planning Advisor
Author	D Aldin
Dept Owner	Retirement Readiness
Approved by	ELT

Doc Number	HR-JD-022
Creation Date	02/01/2021
Review Date	02/19/2025
Last Revised Date	02/19/2025

Job Description Financial Planning Advisor



Written/Reviewed By:	/s/ Don Aldin
Title:	Director of Retirement Readiness
Date Approved:	02/01/2021
Date Reviewed/Revised:	02/19/2025

A job description should be reviewed annually and updated as often as necessary.

See following page for revision tracking notes.

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Author	D Aldin
Dept Owner	Retirement Readiness
Approved by	ELT

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Purpose.

We believe it is important for current and future employees to understand the values inherent in our ministry and what is expected of them as we seek to serve our mission. To that end it is our conviction that we uphold the dignity of each individual as we embrace the unchanging and longstanding principles of scriptural truth. The Geneva Benefits Group (Geneva) Statement of Faith is not an exhaustive statement of our beliefs. The Bible, as the inspired and infallible Word of God, speaks with absolute authority regarding the proper conduct of mankind and is the unchanging foundation for all belief and behavior. As Geneva is an agency of the Presbyterian Church in America (PCA), the Constitution of the Church shall have control over any provisions of this document. Nonetheless, in order to provide transparency about our beliefs the following Statement of Faith has been created.

We Believe.

1. The Bible to be the inspired, infallible, authoritative, inerrant Word of God (2 Timothy 3:16, 2 Peter 1:21).
2. There is one God, eternally existent in three persons-Father, Son, and Holy Spirit (Genesis 1:1, Matthew 28:19, John 10:30).
3. In the deity of Christ (John 10:33), His virgin birth (Isaiah 7:14, Matthew 1:23, Luke 1:35), His sinless life (Hebrews 4:15, 7:26), His miracles (John 2:11), His vicarious and atoning death (1 Corinthians 15:3, Ephesians 1:7, Hebrews 2:9), His Resurrection (John 11:25, 1 Corinthians 15:4), His Ascension to the right hand of God (Mark 16:19), His personal return in power and glory (Acts 1:11, Revelation 19:11).
4. In the necessity of regeneration by the Holy Spirit for salvation because of the radical corruption of human nature, and that one is justified on the single ground of faith in the shed blood of Christ, and that only by God's grace through faith alone are we saved (John 3:16-19, 5:24; Romans 3:23, 5:8-9; Ephesians 2:8-10; Titus 3:5).
5. In resurrection of both the saved and the lost; they that are saved unto the resurrection of life, and they that are lost unto the resurrection of condemnation (John 5:28-29).
6. In the spiritual unity of believers in our Lord Jesus Christ (Romans 8:9, 1 Corinthians 12:12-13, Galatians 3:26-28).
7. In the present ministry of the Holy Spirit by whose indwelling the Christian is enabled to live a godly life (Romans 8:13-14; 1 Corinthians 3:16, 6:19-20; Ephesians 4:30, 5:18).

This Section to be Updated by HR Department Only

Title	Statement of Faith
Author	C Lilly
Dept Owner	HR
Approved by	ELT

Policy Number	HR-008
Creation Date	07/26/2022
Review Date	08/05/2024
Last Revised Date	08/06/2024

POLICY
Statement of Faith



8. The Gospel message is for every tribe, tongue, and nation. (Revelation 7:9-10, 14:6).
9. Bible-believing, professed Christians should be faithful members of a Gospel preaching church. (Acts 2:42,44,46; Hebrews 10:24-25).

This Statement of Faith reflects the intentions of Geneva. However, all hiring, job placement, discharge, and other employment decisions will be made in and at the sole discretion of Geneva.

Regardless of denominational affiliation, all employees agree to respect the PCA's and Geneva's beliefs. Geneva reserves the right to discharge employees for any reason, including but not limited to immoral or unethical conduct, conduct contrary to Scriptural teachings, habitual or unrepentant sin, and conduct negatively affecting other employees or reflecting negatively on Geneva's ministry and witness for Christ, and without regard to whether such conduct occurs on or off company time or premises.

Geneva's Executive Leadership Team ("ELT") holds final interpretive authority on biblical meaning and application with regard to the impact of PCA faith, doctrine, policy, practice, and discipline on all Geneva employment and operational decisions.

The ecclesiastical Constitution of the Church is defined in the Book of Church Order, Preface III. The provisions of the Constitution shall [have] control over any provisions of this Policy to the extent of any conflict therewith.

I hereby acknowledge that I have received, read, and understand this Statement of Faith as outlined above. I also acknowledge that I am in agreement with this Statement of Faith.

Signature	
Printed Name	
Date	

Return signed form to the Geneva's HR Department

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Author C Lilly
Dept Owner HR
Approved by ELT

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