



**WINGATE UNIVERSITY**  
Position Description

**Position Title:** Financial Planning Counselor

Founded in 1896, Wingate University is a private, comprehensive institution offering students active learning opportunities through personalized instruction, world travel, career discovery, faith development, and community service. Wingate University is a residential university with a liberal arts core located near Charlotte, North Carolina. More information about the university may be found on our website:

<http://www.wingate.edu>

**FLSA Classification:** Hourly, Non-Exempt Staff

The Financial Planning Counselor provides a wealth of financial aid knowledge to students and families for federal, state, and institutional programs in accordance with all applicable rules and regulations, while providing superb customer service. The Financial Planning Counselor position reports to the Director of Student Financial Planning and will have a high level of contact with students and families as well as being responsible for file review, and awarding/processing.

**Primary Duties and Responsibilities:**

- Counsel students and parents on the financial aid application process.
- Advise students and parents on eligibility requirements for federal, state, and institutional aid.
- Ensure compliance with all financial aid policies, procedures, and regulations.
- Adhere to a superior level of customer service.
- Monitor and track financial aid files and paperwork.
- Support all day to day operations of the Financial Planning Office.
- Use the institution's multiple computer software systems to ensure an easy flow of data.
- Assist with projects as needed.

**Qualifications:**

- Bachelor's degree required.
- One-year experience working in Financial Aid and knowledge of federal and state financial regulation is strongly preferred.
- Must be able to read, understand, apply, and explain federal and institutional policies and regulations.
- Must possess excellent interpersonal skills, and demonstrate a commitment to developing connections with and providing superb customer service to the Wingate community.
- Must be able to manage multiple tasks and work in a fast-paced and deadline-oriented environment, while maintaining accuracy and attention to detail.
- Experience with Ellucians PowerFacts is preferred.

**Additional Criteria:**

- Desire to work in a student-centered and team-oriented creative environment.
- Available for work on limited evenings as needed

For consideration please send letter of interest, resume to Wingate University Human Resources at [hr@wingate.edu](mailto:hr@wingate.edu).

*EQUAL OPPORTUNITY EMPLOYER: Wingate University abides by all federal and state laws prohibiting employment discrimination solely on the basis of a person's race, color, creed, national origin, religion, age (over 40), sex, marital status or physical handicap, except where a reasonable, bona fide occupational qualification exists. Wingate University is committed to the provisions of the Americans with Disabilities Act and its amendments. Wingate University expressly prohibits any form of workplace harassment based on race, color, religion, gender, sexual orientation, gender identity or expression, national origin, age, genetic information, disability or veteran status.*