



COMMUNITY FIRST FUND TEAM MEMBER PROFILE

Date: 07/2021

Name: Vacant

Position/Title: Member Service Representative

Department: Credit Union Reports To: Branch Manager

Salary Band: Office Support Non-Exempt

CHARACTERISTICS

- Organized/ Efficient
- Approachable
- Analytical
- Independent/ Self-motivated
- Adaptable and Strategic Leader
- Ethical
- Goal Oriented
- Friendly
- Courteous
- Conscientious
- Self-starter
- Self-awareness
- Learning mindset
- Performs well in a fast paced work environment
- Supportive
- Curious
- Creative
- Customer focused

SKILLS

- Proficiency in Microsoft Products.
- Capacity to learn Credit Union software systems and databases, including but not limited to cloud based programs like Microsoft 365.
- The ability to maintain a high degree of accuracy and attention to detail.
- Ability to work independently.
- Strong written and verbal communication skills.
- Strong analytical skills.
- Excellent customer service skills
- Ability to work effectively with racially and socially diverse individuals.
- Ability to read and write Spanish.

EXPERIENCE

- 2 – 4 years of Credit Union experience.

- High school diploma or GED.
 - 2 – 4 years of customer service experience.
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ROLE: The Member Service Representative will work with members to meet financial service needs through processing transactions and suggesting new products or services. They are responsible for delivering the highest level customer service, accurate and efficient processing of member transactions, promoting products and services, resolving member account issues, making modifications to accounts, adding account services, opening new accounts, and performing those functions according to the policies and guidelines of the credit union in a friendly, helpful manner.

RESPONSIBILITIES:

1. **Member Services**
2. **Teller Obligations**
3. **Office Support**
4. **Individual, Team and Company Participation**

EXPECTATIONS:

1. **Member Services**
 - a. Answer inquiries from members and potential members
 - b. Open new accounts
 - c. Screen new applicants as directed
 - d. Assist members with requests for services including but not limited to stop payments, originals or copies of cleared share drafts, direct deposit, and signature verification.
 - e. Assist members in completing loan applications
 - f. Cross-sell services while assisting members with specific requests
 - g. Perform one-on-one member education in basic products and services
 - h. Order check books for members
 - i. Assist with ATM pin number changes and other ATM related requests
2. **Teller Obligations**
 - a. Ensure that your drawer is ready by the designated time.
 - b. Perform on-line transactions (in person, by mail or by phone): process deposits (including check holds), withdrawals, transfers, loan payments, fees, money orders, direct deposit, CU check withdrawals, payroll deduction, cashed share drafts, and other duties that may not be listed.
 - c. Process automatic transfers and loan payments; update manager as loans are paid
 - d. Verify availability of funds for withdrawal
 - e. Verify endorsements on checks
 - f. Balance drawer at the designated time
 - g. Lock teller drawer and money in vault at the designated time
 - h. Balance money orders sold in your drawer

- i. Print teller drawer report for your teller initials, balance against receipts, and ensure that all receipts are attached and initialed
 - j. Research discrepancies on end of day reports as needed
 - k. File daily work, membership cards, loan files, etc.
 - l. Report large cash deposits as directed
3. **Office Support**
- a. Participate in vault count as directed
 - b. Maintain records and files as directed
 - c. Follow internal control procedures
 - d. Open and distribute mail; process checks and requests from members and others, as needed
 - e. Have work areas and office organized, clean, and well-presented at all times
4. **Individual, Team & Company Participation**
- a. Quarterly Coaching Sessions and Annual Review Meeting
 - b. Department Meetings
 - c. Opportunities Meeting, Quarterly Business Meeting as directed
 - d. Participate in training, assessments and surveys as directed
 - e. Special Events Attendance & Support

Physical Demands

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- While performing the duties of this job, the employee is frequently required to stand, sit, talk and hear.
- The employee is occasionally required to move about the office; use hands and fingers to feel, handle, or operate office equipment.
- Specific vision abilities required by this job include close vision and the ability to adjust focus.

Work Environment

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 work is performed primarily in an office or client business setting. The noise level in the work environment is moderate.
- Travel in a wide geographic area is required approximately 10% of the time. Employee must have transportation in order to travel outside of the office for meetings, conferences, client visits and other job-related commitments.

The duties listed above are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related or a logical assignment to the position. The team member profile does not constitute an employment agreement between the employer and employee and is subject to change by the employer as the needs of the employer and requirements of the job change.