

## **Member Service Representative**

Serves as a liaison between the members and the Credit Union. Responsible for providing account information, opening new accounts and professionally handling the members' daily Credit Union needs. Provides a variety of transaction services to members.

### **Essential Functions**

- Represent the Credit Union to the members in a courteous and professional manner and provide prompt, efficient and accurate service in the processing of transactions.
- Perform routine transactions, including but not limited to processing deposits, withdrawals, loan payments received in-person, through night drop and from U.S. Postal mail, and transfers; issuing temporary checks and ATM/VISA Debit cards, check cashing, selling stamps and opening accounts, CD's & IRA's.
- Provide in person and by telephone, general and specific service-related information concerning Credit Union services or policies.
- Respond to members' requests, problems and complaints, and/or direct them to the proper person for specific information and assistance.
- Open new accounts and service existing accounts. Set up new account files and provide members with all necessary information for membership.
- Handle requests from members for transfers of shares to loan payments, share withdrawals, check requests, line of credit advances and any other requests received from members.
- Conduct orientation interviews on Credit Union services and programs with each new Credit Union member.
- Responsible for issuing and balancing money orders, travelers' checks, and Credit Union checks in a daily basis. Also responsible for activity reporting and remittance.

### **Job Specifications**

- Professional, well-developed interpersonal skills necessary for servicing Credit Union members and projecting a positive image as representative for the Credit Union.
- Work requires extensive knowledge of all Credit Union products and services. Symitar Episys Core System preferred.
- These characteristics are normally acquired through completion of education up to the equivalent of a four-year high school education plus some similar or related experience in the member service and/or teller area of a Credit Union or financial institution.
- Basic mathematical skills required (adding, subtracting, multiplying, dividing.)
- This job requires standing and sitting the majority of the day and occasional bending, twisting, reaching above and at below shoulder level, finger dexterity, handling or filing objects, tools or controls, talking and hearing.
- The position requires frequent lifting of up to 10 pounds and occasional lifting of up to 35 pounds.