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## Sb1 FEDERAL CREDIT UNION JOB DESCRIPTION

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**Date:** January 2010  
**Title:** Member Service Field Representative  
**Job Class:** 6 Non-Exempt  
**Reports To:** Branch Supervisor  
**Supervises:** None

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### **General Purpose:**

To create a positive, memorable experience with each member through prompt, friendly interactions while following Credit Union policies and procedures.

Responsible for matching the Credit Union's products with the needs of members; takes a proactive approach in selling products that meet member's needs and exceeds established goals.

### **Essential Functions:**

1. Greet members in person at the Quest branches and/or on the telephone to assist members with membership applications to establish new accounts.
2. Complete on boarding process for new members to build a long-term relationship with the Credit Union and cross-sell additional services that may fit the member's needs.
3. Answer telephone and receive members to handle member's inquiries and/or resolve issues in a timely manner.
4. Originate loan applications in loan software, submit for approval to loan system, responsible to complete stipulations for approval, print loan documents and complete loan disbursements.
5. Knowledge to assist members with Certificate and IRA services.
6. Process international and domestic wire requests for members.
7. Act as Teller or Member Service Rep as needed in all branches and satellite offices.
8. Must have a valid driver's license, ability to operate a motor vehicle, and proper insurance coverage.

### **Other Duties:**

1. Provide marketing material and handle specific requests from members for information about the Credit Union.
2. Handle account changes.
3. Serve as membership officer and/or Notary Public, as needed
4. Perform other duties as required.
5. Responsible for the collection and processing of member's transaction requests from drop boxes at each Satellite branch.
6. Perform other duties as required.

**Job Requirements (Knowledge/Abilities):**

1. Demonstrated ability to provide courteous and professional service to members.
2. Demonstrated ability to explain and initiate the processing of credit union services.
3. Familiar with Credit Union functions and sales ability.
4. Knowledge of credit union products and services.
5. Knowledge of organization's policies/procedures and credit union's service philosophy.
6. Knowledge of credit union deposit and lending functions.
7. Knowledge of credit union's in-house computer system.
8. Effective written and verbal communication skills
9. Strong interpersonal and presentation skills.
10. Knowledge of safety and security program for false alarms, robberies, bomb threats and extortion.

**Job Requirements (Education/Experience):**

1. High School diploma or equivalent.
2. Financial institution experience normally acquired through one year working in a Financial Services position or equivalent.

**Working Conditions:**

The credit union is committed to working with its employees to reasonably accommodate them with the physical aspects of the position. The working conditions are general business office with daily member contact, interaction with volunteers and management. Other working conditions include sitting for extended periods of time, frequent up/down motion, reaching downward or overhead from sitting position, stooping, bending and pushing/pulling, climbing some stairs, lifting and moving moderately heavy items and repetitive keyboard typing.

**Disclaimer:**

The above information on the description has been designed to indicate the general nature and level of work performed by employees within this classification. It is not designed to contain or be interpreted as a comprehensive inventory of all duties, responsibilities and qualifications required of employees assigned to this job.

*Signature below indicates the employee has read the above job description that has been designed to indicate the general nature and level of work performed by employees within this classification.*

\_\_\_\_\_  
Employee's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Manager's Signature

\_\_\_\_\_  
Date