
Sb1 FEDERAL CREDIT UNION JOB DESCRIPTION

Date: January 2010
Title: MEMBER SERVICE REPRESENTATIVE III
Job Grade: 7 Non-Exempt
Reports To: Branch Supervisor
Supervises: None

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 needs and exceeds established goals.

Essential Functions:

1. Greet members in person 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. Handles IRA programs. Assists staff in answering IRA related questions and interfaces with outside IRA information services. Performs IRA reporting.
4. Coordinates with training department for IRA training and annual updates to staff.
5. 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.
6. Process international and domestic wire requests for members
7. Reviews and answers member questions requests and concerns received through Communications center and Silver Cloud databases daily.
8. Provides updates to Silver Cloud database as needed.
9. Train new branch staff on new products and procedures.

Other Duties:

1. Maintain a complete knowledge of Credit Union deposit services and policies.
2. Handles deceased accounts.
3. Assures compliance with backup withholding regulations
4. Handles all Harland re-run requests. Provides all problem resolutions for members with Harland products.
5. Prepares monthly Harland report.
6. Complete outbound calls to members for special projects assigned to promote Credit Union promotions and cross-sell additional services that may fit the member's needs.
7. 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. Knowledge of Credit Union products and services.
4. Knowledge of organization's policies/procedures and Credit Union's service philosophy.
5. Knowledge of Credit Union deposit and lending functions.
6. Knowledge of Credit Union's in-house computer system.
7. Effective written and verbal communication skills.
8. Strong interpersonal and presentation skills.
9. Knowledge of safety and security program for robberies, bomb threats and extortion.

Job Requirements (Education/Experience):

1. High School diploma or equivalent.
2. Financial service experience normally acquired through 2 - 3 years working in a lending/customer service capacity in a financial institution.

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