



Job Title	RETAIL MEMBER SERVICES REPRESENTATIVE II - Entry
Reports To	Retail Community Office Manager

PURPOSE

To provide thorough and accurate member service through teller functions, new accounts, loan services, and other related functions that meet the needs of both the member and the credit union. These responsibilities shall be performed through courteous and accurate transactions and in accordance with established policies and procedures, and with a minimum of supervision to assure that the needs of the member(s) are served and the objectives of the credit union are met.

FUNCTIONS

- Responsible for member marketing of the Credit Union and knowledge of all services offered to a degree that will enable answering questions, cross selling or referring member for specific services in a positive and professional manner.
- Actively contribute to the success of the Credit Union by working positively within the retail community office and supporting achievement of organizational goals.
- Responsible for processing all teller transactions related to member accounts.
- Responsible for accurately maintaining change fund drawer, related checks and tickets, document preparation, computer input, cash and check handling and balancing of same on a daily basis.
- Maintain familiarity with credit union policies and procedures contained in all manuals pertinent to job duties to ensure compliance with state and federal laws and regulations.
- Perform other duties as assigned.

CONTACTS

Establishes and maintains relationships necessary to carry out the activities of this position. Plays an active role in helping the credit union team function smoothly and effectively.

AUTHORITY

The incumbent is authorized to take any action to carry out the responsibilities assigned by the Retail Community Office Manager so long as such action does not deviate from established policies and represents sound business judgment; except for specific limitations placed on the incumbent’s authority by specific assignments to other personnel.

PREREQUISITES FOR THIS POSITION

- **Minimum Education:** High school graduate or equivalent.
- **Minimum Experience:** One year of public contact, with six months experience in a secretarial/office position. Six months experience in a financial institution and/or in a retail sales culture desirable. Six months Teller experience desirable.
- **Personal Characteristics and Skills:** Must be of the highest integrity, in good health and with personal habits above reproach. A positive attitude and charismatic personality, strong and proven work ethic and teamwork mentality is essential. A demonstrated ability to accept and meet new challenges. Be competitive and proactive in nature. Must be adaptable and flexible as pertaining to a working schedule. Knowledge of financial services is important but equally important is the desire and skill to identify and meet our member’s needs. Must practice confidentiality and be able to work well under pressure. Must be self-motivated, efficient,

accurate, and organized. Must be a mature person with sound judgment. Must have the ability to meet and work effectively with people of varying levels of education and experience and be able to communicate, both written and orally, with same. Must be able to take direction and be willing to seek counsel of supervisor as necessary. Technical skills must include prior training or performance of operating a calculator and a computer terminal. Must type a minimum of 35 wpm.

- **Working Conditions:** Continuous alertness, precision, and concentration to ensure accuracy and thoroughness of documents and transactions. Continuous alertness of surroundings for security purposes. Frequent performing basic numeric calculations, as well as writing, reading, comparing, and analyzing. Frequent use of judgment, reasoning, patience, and negotiating in solving members' problems. Exposed to potentially hazardous conditions, i.e., robbery. Occasional travel is required. This position may require extended or irregular hours. Continuous standing and/or sitting for long periods of time when providing member services or performing other duties related to the position. Occasional lifting up to 50 pounds. Occasional bending, squatting or kneeling to reach supplies on ground level. Occasional reaching above shoulder level to reach supplies overhead. Continuous use of hands in repetitive tasks such as simple grasping, twisting/turning of wrist; finger dexterity to perform various accounting duties such as using a ten-key calculator, typing, and entering data into the computer system.

Employee Signature

Date

Supervisor Signature

Date