

MEMBER SERVICE REPRESENTATIVE

Job Description

Assess needs and provide assistance to members in person and by phone promptly, professionally, and accurately.

Required Skills and Abilities

- Must possess member service skills and ability to work well within a group setting;
- Proficient with Microsoft Office including Outlook, Excel, and Word;
- Have a strong understanding of credit union operations, including teller functions;
- Excellent interpersonal skills, written and verbal communication skills;
- Be attentive to detail;
- Able to manage time and make decisions;
- Have a positive and energetic attitude;
- Ability to work independently with minimal supervision;
- Display initiative and organizational skills;
- Acceptable credit and background check required.

Major Duties and Responsibilities:

- Answer Phones
 - Provide account information to members such as balances, check clearings, deposit verifications, statement information, etc.;
 - Provide savings and loan rate information and other service information;
 - Conduct transactions, explain membership eligibility, and provide information about products and services including e-service and debit card inquiries, online and mobile banking, and bill payment applications, requests for address changes, funds transfer, and order checks;
 - Complete and verify wire transfers;
 - Process cash advances;
- Open accounts;
- Fill in on the teller line or reception desk, as needed;
- Print or order debit cards, as needed;
- Conduct IRA transactions including opening/closing accounts, posting distributions, etc.;
- Scan signature cards for accounts opened;
- Monitor negative account list, sending letters as needed;
- Recording charge-off deposit accounts and recoveries;
- Process division payroll cuts;
- Notary;

Education/Experience

- High school diploma or GED, required
- Two years of teller experience, preferred