

<b>Job Title</b>	Financial Services Representative
<b>Short Description</b>	Assist members with a wide variety of service and advise as to how best utilize company products and services in order to meet personal financial goals and provide the highest quality member service.
<b>Full Description</b>	<p><b>MAJOR DUTIES AND RESPONSIBILITIES:</b></p> <p>Conduct interviews with loan applicants for various types of loan requests. Identify and uncover needs through conversation and make appropriate recommendations for loans and products based on member needs. Review all documentation for completeness and accuracy according to established policies, procedures, and compliance guidelines.</p> <p>Use every member contact as an opportunity to advise members about additional services or products that benefit them. Ensure established production goals are exceeded on a monthly basis by identifying opportunities through needs-based conversations.</p> <p>Open various new accounts, accurately updating and inputting member information into our system. Properly explain and educate members about services/products they will benefit from using needs-based conversation skills. (Example: Visa Debit Card, online banking, Card Valet, etc.). Assist with wide variety of member services including open/close share certificates, assist members with account questions, fraud/dispute issues, and notary services. Open, service, and maintain safe deposit boxes.</p> <p>Provide backup and support to teller line upon request or need. Assists with member care center calls and FSR loan line as needed.</p> <p>Comply with all company policies, procedures, and service standards. Comply with all applicable laws and regulations.</p> <p>All other job responsibilities as assigned by management.</p> <p>Create and maintain a clean, neat, and professional environment and have a positive outlook and behavior toward members and team members.</p> <p><b>EXPERIENCE:</b></p> <p>Six months to two years of financial industry sales and service experience with consumer lending experience. *A college degree will satisfy the requirement for 2 years of experience required.</p> <p><b>INTERPERSONAL SKILLS:</b></p> <p>A significant level of trust and diplomacy is required to be an effective subject matter expert in the position. Ability to communicate information of a sensitive and/or highly confidential nature is a normal part of the day-to-day experience. Communications can involve motivating, influencing, educating,</p>

and/or advising others on matters of significance. Ability to develop and foster strong working relationships with team members and members to ensure we are achieving the overall mission and vision of the credit union. Incorporate core values into daily activities and decisions.

**OTHER SKILLS:**

Good written and verbal communication skills. Ability to multitask. Logic and reasoning skills. Time management. Microsoft Office.

**PHYSICAL REQUIREMENTS**

Perform primarily sedentary work with limited physical exertion and occasional lifting of up to 10 lbs. Must be capable of climbing/descending stairs in emergency situation. Must be able to operate routine office equipment including telephone, copier, facsimile, and calculator. Must be able to routinely perform work on computer for an average of 6-8 hours per day, when necessary. Must be able to work extended hours whenever required or requested by management. Must be capable of regular, reliable and timely attendance.

**MENTAL AND/OR EMOTIONAL REQUIREMENTS**

Must be able to perform job functions independently and with limited supervision. Must work effectively as part of a team. Must be able to read and carry out various written instructions and follow oral instructions. Must be able to speak clearly and deliver information in a logical and understandable sequence. Must be able to perform basic financial calculations with accuracy. Must be capable of dealing calmly and professionally with numerous different personalities from diverse cultures at various levels within and outside of the organization and demonstrate highest levels of customer service and discretion when dealing with the public. Must be able to perform responsibilities with composure under stress of deadline, requirements for extreme accuracy and quality and/or fast pace. Must be capable of exercising highest level of discretion on confidential matters.

<b>Education</b>	High School Degree or GED
<b>Additional Comments</b>	
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<b>Expiration Date</b>	03/01/2022