

EXCEL FEDERAL CREDIT UNION

POSITION DESCRIPTION

POSITION: Member Services Representative

SCOPE: Position is primarily responsible for providing customer service support to the organization.

AUTHORITY: Reports to Executive Director of Operations

DUTIES AND RESPONSIBILITIES:

- Accepts and processes consumer loan and credit card applications according to current credit union policies and procedures.
- Expertise in the automobile title and lien perfection areas.
- Provides information to members and offers and sells the financial products and services of the credit union to the membership and prospective members.
- Handles member inquiries or concerns in a courteous, tactful and efficient manner.
- Opens and closes various accounts, i.e., savings, checking, money market, business accounts, etc.
- Provides telephone teller services when necessary, i.e., withdrawals by mail, transfers, loan payments, etc.
- Opens and performs maintenance on share certificates of deposit.
- Opens and maintains IRA accounts, including IRA certificates.
- Processes and approves ATM and debit card applications.
- Assists with file maintenance postings on accounts.
- Answers all mail and email inquiries on the financial services/products offered.
- Performs backup duties for other operational positions occasionally as required, i.e., teller, receptionist, card services.
- Research accounts for deposit, withdrawal, and loan payment discrepancies.

- Perform other duties as assigned, which include but are not limited to filing, preparing reports, preparing membership packets, and assisting with membership drives.

PERSONAL REQUIREMENTS:

- Experience in banking/financial institutions with similar duties and responsibilities for minimum one year.
- Excellent written and verbal skills
- Knowledge of credit union policies, procedures and financial products

This position has regular working hours and compensation includes a generous employee benefits package.

To apply, please send your resume to info@excelfcu.org