

Job Title Virtual Member Relations Specialist

Short Description This position serves as Member Relations Specialist in the credit union's Virtual Services Center, the center receiving all in-bound calls from our membership. This position is responsible for answering all member questions, while cross-selling to deepen member relationships. This position is also responsible for appropriately managing this effort while being mindful of calls in queue to be answered. This position, only when necessary and as directed, will be able to float to other branches to cover in member services when needed for appropriate operational coverage.

Full Description Essential Duties and Responsibilities include the following. Other duties may be assigned.

- Be knowledgeable of all credit union products/services and account processing procedures relating to all deposit and loan functions.
- Provide prompt, accurate and professional service to our members.
- Answer member questions and investigates and corrects errors including maintenance on the data processing system.
- Sell and open ALL credit union products/services, to increase our penetration of credit union products/services per member.
- Develop sales leads using personal contacts, referrals, reports, etc.
- Ensure accuracy of member account information with each member interaction.
- Meet and/or exceed new accounts and loans goals and expectations as outlined by credit union and Member Relations Manager and/or AVP – Branch Services for product sales.
- Participate in incentive program tied to loan product sales goals.
- Ensure delivery of all account and loan documents to optical.
- Review remote deposit exceptions and approve if necessary.
- Handle all online check orders that has ordering exceptions via email.
- Order checks for share draft accounts by phone, fax or email requests.
- Effectively manage loan ques to prevent lost business.
- Handle GAP/Warranty Claims questions and cancellation questions.
- Field, manage and answer all debit and credit cards related issues.

- Produce and provide Adverse Action notices.
- Process ECM payments for loans.
- Field, manage and answer all Collateral Protection Insurance questions.
- Field, manage and answer all incoming general e-mail inquiries coming through inquiry@guardianscu.coop.
- Assist members with initiating all Payment Assurance claims.
- Serves as centralized processor and facilitator of any in-coming promotional offers conducted by marketing (Holiday Loan, Vacation Loan, Skip-A-Pay, etc.)
- Conduct loan interviews and loan processing for loans by phone and assist with Internet loan processing as directed. Process and close loans by phone and online applications.
- Order property searches, flood searches, and appraisals when appropriate.
- Create loans on the data processing system and produce loan documents.
- Coordinate and participate in loan closings that are able to be handled virtually.
- Prepare reports as requested by the Virtual Member Relations Manager and/or AVP – Virtual Services.
- Accept wire transfer requests.
- Attend meetings and training sessions as directed.
- Develop an understanding of credit union history and the credit union philosophy.
- Remain knowledgeable about laws and regulations involving member service.
- Perform other related duties as assigned.

Education	High school diploma or general education degree (GED); or one to three months related experience and/or training; or equivalent combination of education and experience.
Additional Comments	Position requires multi-tasking and ability to handle a fast-paced environment.
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