

Job Title Universal Member Service Representative

Short Description Jax Federal Credit Union is seeking a Universal Member Service Representative to serve as a resource within the branch network for new and existing member account, loan needs, and teller needs. Maintain extensive knowledge of all products and services to promote and cross sell through a consultative needs-based approach. Work in a float capacity, traveling to branches as needed serving as a Member Service Representative and Teller.

Full Description Jax Federal Credit Union is seeking a Universal Member Service Representative to serve as a resource within the branch network for new and existing member account, loan needs, and teller needs. Maintain extensive knowledge of all products and services to promote and cross sell through a consultative needs-based approach. Work in a float capacity, traveling to branches as needed serving as a Member Service Representative and Teller.

Status: FT (approximately 40 hours per week)

Location: Position will work at multiple branch locations as needed.

Major Duties and Responsibilities:

1. Travel throughout the branch network assisting on the platform and teller line in the capacity of an MSR 1 and Teller 2.
2. Interviews members and potential members and presents Jax Federal Credit Union products and services that meet the needs of the members financial success.
3. Process and close loan applications to include consumer loans and VISA credit cards. Refers Home Equity applications to an MSR 2 or 3 for processing.
4. Possess a strong understanding of credit reports and consumer lending documentation.
5. Open new membership accounts to include consumer accounts only. Refer the opening of business accounts to an MSR 2.
6. Be proficient in our online product offerings, assisting members to the trained skill level and referring members for further assistance to an MSR 2 or 3.
7. Acquire and show the ability to assist members using JAXFCU's service and sales standards.
8. Assist members with member service inquiries that include debit card items, debit card fraud and dispute requests, stop payment requests, unauthorized ACH requests, statement review, member balancing assistance, deposit product rate review, name record file

maintenance items, online banking items, and IRA withdrawals and maintenance.

9. Follow up with members to obtain needed loan documents to complete loan requests, deposit documents to complete the account opening or closing process.

10. Follow up with member with problem resolution issues to provide support or closure to member situations.

11. Administrative duties as assigned to include quality assurance of new accounts and new loans and the scanning of any documentation.

12. May be responsible for opening and closing of safe deposit box if branch location offer this service.

13. Work outbound calling campaigns and any assigned sales call from Branch Manager.

14. Act as a branch notary for members.

15. Attend meetings and training sessions.

16. Other duties as assigned.

Knowledge & Skills

Experience:

Six months to two years of similar or related experience. Must maintain required insurance licenses.

Education/Certifications/Licenses:

A high school degree or GED is required.

Interpersonal Skills:

A significant level of trust and diplomacy is required, in addition to normal courtesy and tact. Work involves extensive personal contact with others and/or is usually of a personal or sensitive nature. Work may involve motivating or influencing others. Outside contacts become important and fostering sound relationships with other entities (companies and/or individuals) becomes necessary.

Other Skills:

Able to operate a 10-key calculator, typewriter, and computer keyboard.

Proficient in Microsoft products.

The ability to learn new systems and adapt quickly to changing technology

Valid drivers license is required.

ADA Requirements

Physical Requirements:

Is able to bend, sit, and stand in order to perform primarily sedentary work with limited physical exertion and occasional lifting of up to 10 lbs. Must be capable of climbing / descending stairs in an emergency situation. Must be able to operate routine office equipment including computer terminals and keyboards, telephones, copiers, facsimiles, and calculators. 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 or travel off site whenever required or requested by management. Must be capable of regular, reliable and timely attendance.

Working Conditions:

Must be able to routinely perform work indoors in climate-controlled shared work area with minimal noise.

Mental and/or Emotional Requirements:

Must be able to perform job functions independently or with limited supervision and work effectively either on own or as part of a team. Must be able to read and carry out various written instructions and follow oral instructions. Must be able to complete basic mathematical calculations, spell accurately, and understand computer basics. Must be able to speak clearly and deliver information in a logical and understandable sequence. 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 the stress of deadlines / requirements for extreme accuracy and quality and/or fast pace. Must be able to effectively handle multiple, simultaneous, and changing priorities. Must be capable of exercising highest level of discretion on both internal and external confidential matters.

Acknowledgement

Nothing in this position description restricts management's right to assign or reassign duties and responsibilities to this job at any time.

Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. This job description is not a contract and should not be construed as a guarantee of employment for any

specific period of time.

We are an Equal Opportunity Employer and do not discriminate against employees or applicants based on race, color, religion, sex/gender, national origin, disability, age, or any other category protected by law.

Education	A high school degree or GED is required.
Additional Comments	Apply online by visiting: https://www.jaxfcu.org/careers/
Credit Union	Jax Federal Credit Union
State	Florida
Contact Name	Aimee Haga
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Expiration Date	12/31/2021