

Job Title Member Service Representative

Short Description Jax Federal Credit Union is seeking a Member Service Representative to serve as a resource within the branch for new and existing member account and loan needs. He/she will maintain extensive knowledge of all products and services to promote and cross sell through a consultative needs-based approach. The associate will use outbound sales calls to facilitate new membership and loan growth and handle non-sales related member service issues such as problem resolution and account maintenance.

Full Description Jax Federal Credit Union is seeking a Member Service Representative to serve as a resource within the branch for new and existing member account and loan needs. He/she will maintain extensive knowledge of all products and services to promote and cross sell through a consultative needs-based approach. The associate will use outbound sales calls to facilitate new membership and loan growth and handle non-sales related member service issues such as problem resolution and account maintenance.

Location: Mandarin Branch, 11406-2 San Jose Blvd., Jacksonville, FL 32233

Status: FT (approximately 40 hours per week)

Major Duties and Responsibilities:

Attend meetings, training sessions and other assigned duties.

Act as a branch notary for members.

May be required to assist as a Teller when needed. Will possess working knowledge of the teller area.

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

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

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

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.

Follow up with member with problem resolution issues to provide support or closure to member situations. Administrative duties as assigned to include quality assurance of new accounts and new loans and scanning of any documentation.

Acquire and show the ability to assist members using JAXFCUs service and sales standards.

Be proficient in our online product offerings, assisting members to the trained skill level and referring members for further assistance to a Member Service Representative II or III.

Open new membership accounts to include consumer accounts only. Refer the opening of business accounts to a Member Service Representative II.

Possess a strong understanding of credit reports and consumer lending documentation.

Process and close loan applications to include consumer loans and VISA credit cards. Refers Home Equity applications to a Member Service Representative II for processing.

Interviews members and potential members and presents Jax Federal Credit Union products and services that meet the needs of the members financial success.

Knowledge & Skills

Experience:

Up to six months of similar or related experience including time spent in similar or preparatory positions.

Education/Certifications/Licenses:

A high school degree or GED is required.

Interpersonal Skills:

Courtesy, tact, and diplomacy are essential elements of the job. Work involves personal contact with others inside and/or outside the organization, generally regarding routine matters for purposes of giving and obtaining information, as well as advising or referring, which commonly require shorter discussions.

Other Skills:

Proficient in Microsoft products.

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

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**Credit Union** Jax Federal Credit Union**State** Florida**Contact Name** Aimee Haga**Email** ahaga@jaxfcu.org**Phone** 904-475-8023**Fax** 904-350-9356**Expiration Date** 11/19/2021