

****Proof of COVID-19 vaccine is required for employment at Spectra Credit Union****

Role

The primary function of this role is to accurately process financial transactions and be an effective source of information for members. Provide friendly, professional, confidential and effective assistance in lobby, drive-thru window or by telephone. Ensure a positive member experience and minimum wait time.

Major Duties and Responsibilities

50% - Member Service. Establish and maintain effective member relations; promote credit union products and services by identifying member needs and cross-selling benefits. Assist members with opening and closing accounts, answer questions about products and services and make referrals. Maintain high lobby awareness and take responsibility for member coverage on the line. Create and maintain a clean, neat pleasant work environment by presenting a professional look, positive outlook and behavior toward members and coworkers. Provide backup assistance to coworkers and other branches as needed.

50% - Operations. Demonstrate efficiency with financial transactions for checking, savings and borrowing members. Receive funds, post transactions, and withdrawals as requested. Balance teller cash drawer daily to assure accuracy in transactions, notify manager regarding any outages. Assists in various opening and closing branch duties on a daily basis. Serve as vault teller for the Credit Union, which includes ordering the cash from the Federal Reserve, verifying cash received, filling teller cash orders, maintaining full vault security, and balancing vault cash nightly. Balance and maintain ATMs. Trouble-shoot minor problems with ATMs and/or cash recyclers. Performs other duties as assigned by the Manager or designee.

Must comply with applicable laws and regulation, including but not limited to, the Bank Secrecy Act, the USA PATRIOT Act, the Office of Foreign Assets Control, and the SAFE Act.

Knowledge and Skills

Experience

Six months to two years of similar or related experience, including time spent in preparatory positions.

Education

A high school degree or GED is required. **Bi-lingual fluency in Spanish & English is preferred.**

Interpersonal Skills

A significant level of trust and diplomacy is required to be an effective subject matter expert in the position. In depth dialogues, conversations and explanations with members, and staff of a sensitive and/or highly confidential nature is a normal part of the day-to-day experience. Communications can involve motivating, influencing, education and/or advising others on matters of significance.

Other Skills

Excellent telephone manners and techniques, effective oral and written communication skills, ability to research and resolve problems before they become critical, knowledge of member services, loan policies, and procedures, knowledge of IRA applications, withdrawals, rollovers and transfers, demonstrated ability to identify member needs and sell benefits, ability to work independently within the limits of policy and authority, knowledge and proficient use of computer applications to include spreadsheet and word processing programs, demonstrated ability to provide courteous, professional service in a high-volume environment.

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.

Internal - Grade 7

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