

Advanz Federal Credit Union
Structured Compensation - Job Description
Member Service Representative

Data Year: 2021

Prepared On: 02/05/2021

Department:	Member Service	Grade:	5
Reports To:	VP of Member Services	Classification:	Non-Exempt
Supervises Direct:		Supervises Indirect:	
Approved By:		Effective Date:	07/20/2010
		Revised Date:	12/09/2019

Role:

Receives members in person and by telephone; provides members their balances on savings and share draft accounts; provides general Credit Union information; assists members with deposits and withdrawals; receives cash and checks for deposit and for payment on loans; operates computer terminal to obtain member's status, to input information and to obtain withdrawal checks; at close of business, balances cash and summarizes daily activity; assists members in making changes to existing accounts; assists members in starting, stopping, or changing a payroll deduction; performs related duties.

Essential Functions & Responsibilities:

- N 20% Is knowledgeable of credit union policy and enforce the same.
- N 10% Is knowledgeable of and can open member accounts.
- N 20% Is knowledgeable of proper computer input.
- N 15% Is knowledgeable of cross selling of services and performs the same.
- N 15% And such other responsibilities as set forth in credit union policy or assigned from time to time by the Head Teller, Branch Manager, the Vice President of Member Services or Senior Management.
- N 20% Is knowledgeable of deposits, withdrawals, and balancing of a cash drawer.

Performance Measurements:

1. Receives members in person or by telephone; determines the nature of the member's business and either transacts the member's request or refers him/her to the suitable staff person.
2. Provides, in person or by telephone, routine information concerning Credit Union services or policies, including: what is a credit union; eligibility for membership; how to apply for membership; type of accounts available; insurance coverage for shares and loans; basic loan policies; interest rates charged on loans; how dividends are computed on shares; how to start, change, or stop a payroll deduction; the locations, office hours, and telephone service.
3. Maintains the confidential nature of all member transactions, information, and other related operational data as required.
4. Attends meetings, educational and training sessions, as required, and maintains credit union equipment in proper working order.
5. Performs clerical duties as the situation may warrant.

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6. Has a thorough knowledge of Credit Union savings, depository, withdrawal, and transfer procedures; including all internal controls and security requirements.
7. Receives share, share draft deposits in person or by mail; prepares proper receipt.
8. Disburses cash or check share and share draft withdrawals in person, by telephone, or by mail.
9. Cashes share drafts and checks; transfers money between member accounts as instructed.
10. Operates online teller terminal; provides in person, by telephone, or by mail, such information as member may authorize concerning the status of his/her account.
11. Receives and processes change of name, addresses and such other account information as needed (i.e., Social Security number, etc.).
12. Provides gift or travel cards, money orders, amusement park tickets, and official check services.
13. Process mail requests as the situation may warrant.
14. Opens new accounts and makes changes to existing accounts as requested by members.
15. Closes loans when necessary.
16. Takes wire transfer information provided by the member and performs the transaction.
17. Provides backup to Head Teller for ATM and Vault.
18. Assists the President/CEO and the Sr. Vice President as the situation may warrant.
19. Daily opens and closes computer terminal accounts for assigned transactions and balances to the terminal close report. Remits receipts to the New Account Manager
20. Performs such other duties as may be assigned by his/her supervisor, which are commensurate with his/her position and in the best interest of credit union operations.
21. Follow the Bank Secrecy Act Policy and Procedures.

Knowledge and Skills:

- | | |
|----------------------|---|
| Experience | Two (2) years' work experience, preferably in a financial institution. |
| Education | A high school education or GED. |
| Interpersonal Skills | Work involves much personal contact with others inside and/or outside the organization for the purpose of first-level conflict resolution, building relationships, and soliciting cooperation. Discussions involve a higher degree of confidentiality and discretion, requiring diplomacy and tact in communication. |
| Other Skills | The person holding this position is required to have complete knowledge of Credit Union policies and procedures; the ability to accurately balance credit union transactions; to organize work; mental alertness; neatness in appearance; punctuality; dependability; and a cooperative attitude in relations with members, other employees, and vendors. |

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Physical
Requirements

Work Environment

This Job Description is not a complete statement of all duties and responsibilities comprising the position.

Printed Employee Name

Date

Employee Signature