

*Belonging Never Felt Better*



Non-Exempt  
Grade: 8

**TITLE:** **Specialty Member Services Representative I**

**REPORTS TO:** Manager, Specialty Member Services with direction from Sr. AVP, Member Services or VP, Member Services

**SUMMARY:** Under general supervision, performs all duties and functions of an MSR I and MSR II. Has demonstrated knowledge of credit union products and services including the ability to explain and cross service those products to members and potential members. This is an entry level Specialty Member Services position requiring knowledge in a variety of operational functions.

**PRINCIPAL RESPONSIBILITIES:**

- Performs Specialty Member Services duties and is able to perform all the functions of a Member Services Representative I and II:
  - *Assists with beginning and end-of-day reports and procedures.*
  - *In a courteous, professional manner, assists members with financial transactions.*
  - *Basic knowledge of new accounts procedures.*
  - *Disburses funds by cash, check, or transfer. Accepts deposits or payments and enters each transaction into the credit union's data processing system.*
  - *Sells negotiable items such as cashier's checks and wire transfers.*
  - *Accepts and processes financial service request forms to include automatic transfers, check reorders, etc.*
  - *Accurately balances cash, cash items, and general ledger entries at the end of each business day.*
  - *Is familiar with credit union policies, products, and services and is able to answer member questions and make referrals, as needed.*
  - *Familiar with cannabis banking and pilot program requirements.*

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**JOB DESCRIPTION**

- *Cross-sells credit union products and services.*
- Updates Member information using the monitoring and reporting guidelines set within the Specialty Member Services operating procedures.
- Must work harmoniously with other employees.
- May include evening and/or weekend hour and travel to out-lying offices.
  - This may include onsite visits to cannabis related businesses.
- Comply with credit union operations and security procedures including Currency Transactions Reports, Suspicious Activity Reports, cash drawer limits, robbery procedures, and other credit union safety and security matters.
- Follow regulatory and policy compliance requirements in regard to Bank Secrecy Act (BSA), Office of Foreign Assets Control (OFAC), and Anti-Money Laundering (AML) Regulations, Identity Theft Red Flags, and other compliance-related policies.
- Understands the credit union's formal anti-money laundering program, which includes systems for identifying members who may be at high risk of money laundering or terrorist financing.
- Utilizes Green Check Verified cannabis banking software for transaction validation and account maintenance.
- Performs other duties as assigned.

**ESSENTIAL FUNCTIONS:**

- Actively practices the behaviors required by the credit union's guidelines for Member Service in all interactions with members and staff.
- Maintains excellent member relations, provides services, and cross-sells credit union products.
- Requires regular attendance for the assigned work schedule.
- Preserves member confidentiality.
- Understand and respond to complex verbal and written communications.
- Count and disburse bills, change, etc.

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- With accuracy, enter data using the keyboard and computer terminal to record member transactions.
- Read signatures, signature cards, checks, vouchers, deposit slips, manuals, etc.
- Use a 10-key adding machine daily and operate a variety of office equipment.
- Reconcile and balance financial instruments.
- Lift, carry, and store change bags weighing up to 50 lbs.
- Load, unload, and repair machinery requiring fine motor and physical dexterity.
- Lift, carry, and load 50 lb. boxes of paper for voucher printers.
- Must remain standing for prolonged periods of time. Cannot leave station while performing job duties.

#### **REQUIRED KNOWLEDGE:**

Must have thorough knowledge of all Member Services functions and cash handling techniques. Must be well versed in credit union products and services and able to cross-sell them. Must have excellent written and oral communication skills and the ability to communicate effectively and to project a professional image in person, over the phone, and via electronic means. Working knowledge of Microsoft Word, Excel, and related systems preferred.

#### **EXPERIENCE:**

Minimum of one year full time Member Services experience at Coast Central Credit Union or two or more years with another financial institution. Minimum of 3 years outside customer service or cash handling experience encouraged and may be an option to substitute financial institution experience.

#### **EDUCATION:**

High school graduate or equivalent.