

*Belonging Never Felt Better*



Non-Exempt  
Grade: 7

**TITLE:** **Member Support Center Representative**

**REPORTS TO:** Manager, Member Support Center, Assistant Manager,  
Member Support Center

**SUPERVISES:** No one

**SUMMARY:** Under limited supervision, provides a range of credit union services and information to members and staff by telephone. Prepares and processes transaction requests. Performs a variety of clerical and bookkeeping functions. Assignments are rotated periodically.

**ESSENTIAL FUNCTIONS:**

- Use and operate a variety of office equipment requiring fine motor and physical dexterity including the switchboard console, folding machine, microfiche, fax machine, typewriter and calculator.
- Understand and respond to complex verbal communications from callers.
- With accuracy, use the keyboard and video terminal to monitor and perform financial transactions.
- Reconcile and balance a variety of financial instruments.

**PRINCIPAL RESPONSIBILITIES:**

- Receives and responds to telephone requests from members, potential members and credit union personnel.
- Researches member accounts and resolves member problems.
- Responds to correspondence from members, maintains records and files, calculates payments and performs other member service functions, as required.

- Is familiar with credit union policies, products and services and is able to respond to questions, cross-sell products and make referrals.
- Processes electronic funds transactions, insurance program processing levies, payroll deposits, IRA certificates, loan coupons, etc.
- Posts and balances monetary transactions daily.
- Performs other duties as assigned.

**PHYSICAL REQUIREMENTS:**

- Lift and carry binders or paper weighing up to 50 lbs.
- Must remain seated for prolonged periods. Cannot leave work station while performing telephone related job duties.

**REQUIRED KNOWLEDGE:**

Must have broad knowledge of credit union services. Must demonstrate maturity and professionalism in dealing with members and be accurate in all transactions. Requires knowledge of business practices and procedures, including data processing, the ability to operate a variety of business machines, to make mathematic calculations, to write legibly and to type with reasonable speed and accuracy. Must work harmoniously with other employees. Incumbent must be bondable.

**EXPERIENCE:**

One year of financial services experience with demonstrated ability to handle accounts and provide information with tact and accuracy.

**EDUCATION:**

High school graduate or equivalent experience.