



## JOB DESCRIPTION

Non-Exempt  
Grade: 10

TITLE: **Member Relationship Services Specialist**

REPORTS TO: Manager, Member Services, may receive direction from the Member Services Supervisor and the AVP Member Services Branches, AVP Member Consumer Loan Services, and AVP Loan Administration Manager.

SUPERVISES: No one

SUMMARY: Under limited supervision, performs all duties and functions of a Member Services Representative, New Accounts and Consumer Loan Services Representative. Establishes new member accounts and, account maintenance for existing members, and performs basic loan processing while actively cross selling credit union products and services. Is thoroughly trained and knowledgeable in all credit union products and services and is able to explain and cross-sell them to members and potential members. This is a senior level position requiring demonstrated knowledge and proficiency.

### ESSENTIAL FUNCTIONS:

- With tact and professionalism, handles and resolves member complaints, problems, and answers questions.
- Performs Member Services duties and is able to perform some of the functions of a Sr. Member Services Representative, New Accounts and Sr. Consumer Loan Services Representative:
  - *Assists with beginning and end-of-day reports and procedures. May open or close office as required.*
  - *Establishes and processes new member accounts, prepares required paperwork, and performs other new accounts duties as required.*
  - *Processes loan applications and provides clerical support to Consumer Loan Services staff as required.*



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- *Assists in safe deposit accounts, opens and closes safe deposit boxes, where applicable*
- *In a courteous, professional manner, assists members with financial transactions.*
- *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, wire transfers, pre-paid cards etc.*
- *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.*
- *Admits, with proper identification, access to safe deposit boxes.*
- *Under dual control, processes and documents ATM deposits, merchant bags, and night depository.*
- *Follows security procedures for member services area, including cash drawer limits and robbery procedures.*
- *Is familiar with credit union policies, products, and services and is able to answer member questions and make referrals, as needed.*
- *Cross-sells credit union products and services.*
- *Itemizes and balances checks.*
- Has thorough knowledge of the financial services offered by the credit union and cross-sells products/services as needed.
- Maintains accurate files on member accounts and loan files as required.
- Must work harmoniously with other employees.
- Performs other duties as assigned.



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### **PRINCIPAL RESPONSIBILITIES:**

- 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.
- Preserves member confidentiality.
- Understand and respond to complex verbal and written communications.
- Count and disburse bills, change, etc.
- With accuracy, enter data using the keyboard and computer terminal to record member transactions.
- Read signatures, signature cards, checks, vouchers, deposit slips, manuals, etc.
- Reconcile and balance financial instruments.
- Accurately use a 10-key adding machine and operate a variety of office equipment.
- Reconcile and balance financial instruments.
- Ability to lift & carry 30 pounds.
- Work independently and problem solve effectively.
- Multi-tasking required as well as the ability to produce accurate documentation.
- Load, unload, and repair machinery requiring fine motor and physical dexterity.
- Must be able to remain seated and/or standing for extended periods of time.

### **REQUIRED KNOWLEDGE:**

Must have some knowledge of Member Services and Consumer Loan Services functions and processes. Must be well versed in credit union products and services and able to cross-sell them. Must be trained in safe deposit, new accounts, and loan processing.



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### **EXPERIENCE:**

Minimum of three years combined of Member Services and Consumer Loan Services experience at Coast Central Credit Union, or a combination of at least one year of Member Services and Consumer Loan Services at Coast Central Credit Union and two or more years' experience with another financial institution required.

### **EDUCATION:**

High school graduate or equivalent

