

## **Member Service Representative**

### **POSITION PURPOSE**

Meets and counsels with members and potential members either in person or over the phone and determines his/her needs based on all credit union services. Accepts applications for membership, verifies membership eligibility and ensures that each membership card reflects the proper signatures and support documentation. Performs various transactions including but not limited to; account transfers, wires, account balances, address maintenance, account reconciliation, ordering checks, issuing stop payments, etc. Cross-sells credit union services to qualified members whenever possible. Keeps informed and educated on Credit Union services such as; electronic Online Banking and Online Bill Payment, basic IRA and share certificate knowledge, aiding members with questions about these services.

### **QUALIFICATIONS:**

**EDUCATION/CERTIFICATION:** Associates Degree in Business or a related area, or an equivalent combination of education, experience, and training.

**REQUIRED KNOWLEDGE:** Basic knowledge of account services. Advanced knowledge of financial products and services. Understanding of Credit Union Information Systems and accounting functions. Familiarity with related laws and regulations.

**EXPERIENCE REQUIRED:** Three-Four years of related experience, with a focus on financial products and services. Licensed Notary – a plus.

**SKILLS/ABILITIES:** Accurate and attentive to detail, well organized. Excellent communication skills with the ability to educate members on CU products/services. Good math skills and attentive to detail. Solid public relations abilities. Good organizational and problem-solving abilities; solid analytical abilities, along with basic computer skills and understanding of various software applications.