

Member Service Representative

Serve as a liaison between the member and the credit union. Provide account information by phone or in person, as well as information on the full range of credit union products and services. Resolve issues, and professionally handle the member's daily needs. Provide a variety of transactional services to members.

ESSENTIAL DUTIES AND RESPONSIBILITIES include the following:

- Greet and welcome members and visitors to the credit union in a professional manner. Provide prompt, efficient, and accurate service in the processing of transactions.
- Provide in-person and by-telephone general and specific service-related information concerning credit union services or policies.
- May respond to email or other electronic requests submitted by members, again providing professional, prompt, efficient, and accurate service and information.
- Respond to members' requests, problems, and complaints and/or direct them to the appropriate person for specific information and assistance.
- Handle requests from members for transfers of shares to loan payments, share withdrawals, check requests, line of credit advances, and any other requests received from members.
- Participate in community and branch events that will promote the credit union products and services based on member's needs. Actively cross-sell products.
- Process member mail transactions, and mail receipts and checks to members as indicated by policy and procedure.
- Provide information on investment alternatives to members wishing to deposit funds with the credit union.
- Research accounts for deposit, withdrawal, loan payment discrepancies and assist members in balancing their accounts.
- Responsible for balancing sold money orders and cashier's checks daily.
- Responsibility for compliance, as applicable, with the Bank Secrecy Act, including addressing, in a timely manner, any transaction requiring or warranting action.
- Perform any other duties as assigned by supervisor or management.