

# White Rose Credit Union

## Job Description

**Position:** Full Time Floating Member Service Representative

**Reports to:** Branch Manager

**Purpose:** Serve as a liaison between the member and the credit union. Responsible for providing account information by phone or in person, as well as information on the full range of credit union products and services. Open accounts for members, resolve issues, and professionally handle the member's daily needs. Provide a variety of transactional services to members.

### **Duties/Responsibilities:**

1. Greet and welcome members to the credit union in a courteous, professional, and timely manner.
2. Represent the credit union to members in a courteous and professional manner and provide prompt, efficient and accurate service in the processing of transactions.
3. Provide in-person and by-telephone general and specific service-related information concerning credit union services or policies.
4. May respond to email or other electronic requests submitted by members, again providing professional, prompt, efficient, and accurate service and information.
5. Respond to members' requests, problems and complaints; report all complaints resolved or otherwise to the Branch Manager in a timely manner.
6. Handle request from members for transfers of shares to loan payments, share withdrawals, check requests, and any other requests from members.
7. Back-up Senior Member Service Representatives with opening new accounts, closing accounts, and servicing existing accounts. Setting up new account files and provide members with all necessary information for membership.
8. Promote credit union products and services based on members needs that are obtained from new member's interview.
9. Provide information on investment alternatives to members wishing to deposit funds with the credit union.
10. Research accounts for deposits, withdrawal, and loan-payment discrepancies.
11. Maintain up-to-date information on all credit union products, policies and services that are handled by member service representatives. Remain knowledgeable regarding rules and regulations for the member service area including robbery procedures.
12. Ensure that the workstation is properly stocked with forms, supplies, brochures, etc.
13. Report problems or concerns to the Branch Manager.
14. Keep your work area and equipment clean and neat.
15. Perform other duties as requested by the Branch Manager.
16. Must be able to work the hours of operations to include Saturday's.

### **Experience:**

- Handling of cash

### **Skills:**

- Good interpersonal skills
- Ability to multi-task
- Bilingual is a plus

### **Education required:**

- High School Diploma/Equivalent