



## **MEMBER SERVICES REPRESENTATIVE ENTRY**

**PURPOSE:** To provide personal member financial services through teller related functions in accordance with policies and procedures established by the Credit Union. These responsibilities shall be performed through courteous and accurate transactions to assure that the needs of the members are served and the objectives of the Credit Union are met. To fully understand being an advocate of the Credit Union Movement and must actively advocate the CU Movement throughout employment.

### **FUNCTIONS:**

1. Responsible for member marketing of ALPS Federal Credit Union and a basic knowledge of all services offered to a degree that will enable answering questions, or referring members for specific services.
2. Responsible for accurately processing all teller transactions related to member accounts in person and via phone, mail, and night drop.
3. Responsible for accurately maintaining and balancing a cash drawer on a daily basis.
5. Responsible for opening deposit accounts, including but not limited to: share, sharedraft, money market accounts, and certificates of deposits.
6. Responsible for filing Cash Transaction Reports and submitting to BSA officer.
7. Responsible for receiving check order requests, ACH Origination requests, VISA Debit Card applications, research requests, wire transfers, share draft stop payments, and cashier's check replacements.
8. Responsible for accurately sorting mail.
9. Maintain familiarity with Credit Union policies and procedures regarding job duties to ensure compliance with state and federal laws and regulations.
10. Responsible for completing annual BSA training.
11. Perform other duties/training as assigned by the Member Services Supervisor.

**REPORTS TO:** Member Service Supervisor

### **QUALIFICATIONS:**

1. **Minimum Education:** A basic level of education is required to perform the assigned duties competently such as a completion of a high school diploma or GED. Technical skills must include prior training or performance on a computer and 10-key adding machine.
2. **Minimum Experience:** Six months of teller experience or cash handling experience is required. Technical skills must include prior training or performance of operating computers. Experience using multiple computer programs is a plus.

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3. Personal Characteristics and Skills: Must be of the highest integrity, in good health and with personal habits above reproach. A positive attitude and teamwork mentality is essential. Knowledge of financial services is important but equally important is the desire and skill to identify and meet our member's needs. Must practice confidentiality and be able to work well under pressure. Must be self-motivated, efficient, accurate, and organized. Must be a mature person with sound judgment. Must be able to take direction and be willing to seek counsel of supervisor as necessary.
4. Working Conditions: Continuous alertness, precision, and concentration to ensure accuracy and thoroughness of documents and transactions. Continuous alertness of surroundings for security purposes. Frequent performing basic numeric calculations, as well as writing and reading. Continuous use of initiative, ingenuity, and creativity in identifying member needs, solving member problems and in actively cross-selling credit union services and products. Continuous memory demands in recalling credit union policies and services. Continuous standing and/or sitting for long periods of time when providing member services or performing other duties related to the position. Continuous use of hands in repetitive tasks such as simple grasping, twisting/turning of wrist; finger dexterity to perform various accounting duties such as using a ten-key calculator, typing, and entering data into the computer system.

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Employee Signature

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Date

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Supervisor Signature

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Date