



Financial Freedom **for ALL.**®

Job title: Financial Services Assistant

Work Location: Assigned Location

Division/Department: Operations

Reports to: Branch Manager

☒ Full-time
☐ Part-time

☐ Exempt
☒ Nonexempt

Job Summary:

This position reports directly to the respective Branch Manager of assigned branch location. This position is responsible for (i) performing transaction duties to serve members by receiving or paying out funds with high accuracy, (ii) presenting and explaining credit union product and services to members. Most importantly, this position will follow established procedures to handle a broad variety of member issues including, but not limited to, account maintenance, research, and problem solving

Primary Duties and Responsibilities:

Greet and welcome members to the credit union in a courteous, professional, and timely manner, providing prompt, accurate and efficient member transactions.

Maintain an up-to-date and comprehensive knowledge on all related policies, procedures and rules and regulations, including robbery procedures.

Responsible for cross-selling credit union products and services.

Ensure station is properly stocked with forms, supplies, brochures, etc.

Responsible for opening new accounts and reviewing member applications for accuracy and compliance with Credit Union policies.

Responsible for processing member account requests (researching and resolving member problems).

Other duties as assigned.

Position Specifications/Requirements

Excellent Customer Service Skills

Symitar experience is preferable

Knowledge of Teller and Member Service operations and procedures

Knowledge of and compliance with all necessary regulations including, but not limited to BSA, CIP, US Patriot Act, Fact Act, etc.

Ability to adapt to continually changing and increasingly technical environment

Proven ability to read, write and communicate at a level consistent with the requirements of this position

Ability to work effectively and collaboratively with colleagues

Strong attention to detail

Strong-time management and organizational skills

Good, sound, and practical judgment

Education and/or Work Experience Requirements:

High School Diploma or equivalent

Energetic solutions oriented individual with the ability to multi-task.

Good math and typing skills

Be able to work in a fast work environment, multi-task, meet deadlines, and pay attention to detail.

Minimum of one (1) year of credit union experience

Minimum of six (6) months of processing basic financial transactions (i.e., deposits, transfers, and withdrawals)

Computer proficiency (MS Office – Word, Excel, Outlook)

Must be able to work under pressure and meet deadlines, while maintaining a positive attitude

Ability to work independently and to carry out assignments to completion within parameters of instructions given, prescribed routines, and standard accepted practices

Physical Requirements:

Ability to perform the essential job functions consistent safely and successfully with the ADA, FMLA and other federal, state, and local standards, including meeting qualitative and/or quantitative productivity standards.

Ability to maintain regular, punctual attendance consistent with the ADA, FMLA and other federal, state, and local standards

Dexterity work – must be able to make small movements such as typing and picking up small objects

Sedentary work – standing and/or sitting most of the time

Print Employee Name:**Employee signature:****Date:**

Democracy Federal Credit Union provides equal employment opportunities (EEO) to all employees and applicants for employment without regard to race, color, religion, sex, national origin, age, disability, or genetics. In addition to federal law requirements, Democracy Federal Credit Union complies with applicable state and local laws governing nondiscrimination in employment in every location in which the company has facilities. This policy applies to all terms and conditions of employment, including recruiting, hiring, placement, promotion, termination, layoff, recall, transfer, leaves of absence, compensation, and training. Democracy Federal Credit Union expressly prohibits any form of workplace harassment based on race, color, religion, gender, sexual orientation, gender identity or expression, national origin, age, genetic information, disability, or veteran status. Improper interference with the ability of Democracy Federal Credit Union's employees to perform their job duties may result in discipline up to and including discharge.