



Job title: Financial Services Specialist I

Work Location: Assigned Location

Division/Department: Member Services

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 selling products and services to our members by telephone as well as performing teller transactions (non-cash).

Primary Duties and Responsibilities:

- Responsible for providing enthusiastic, professional, quality telephone service to members, and non-members.
- Responsible for processing various inquiries and transactions as directed by properly identified members.
- Responsible for recommending products and services to members to enhance their quality of life.
- Responsible for maintaining current working knowledge of policies and procedures.
- Responsible for complying with applicable regulatory laws pertaining to the credit union and internal policies and procedures.
- Responsible for establishing, retaining and deepening relationships with our members and potential members to achieve individual and team sales goals
- Responsible for proactive sales activities of basic products while referring loans request (e.g., loan mortgages, home equity loans) to an employee with more loan interviewing experience.
- Responsible for providing quality member service by resolving complex service issues or referring to appropriate associate to guarantee member satisfaction and retention.
- Responsible for processing transactions accurately and efficiently to build member confidence and trust, based on established policies and procedures.
- Other duties as assigned.

Position Specifications/Requirements

- Symitar experience is preferable
- Excellent Customer Service Skills
- 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
- Minimum of one (1) year of credit union experience
- Minimum of 1-year of processing basic financial transactions (i.e. deposits, transfers, and withdrawals)

- Minimum of 1-year of successful sales experience in a goal and/or incentive-based environment within the past three years
- Skilled in developing financial relationship to existing and potential members
- Ability to generate new business by outbound calling and by reaching out to the local community through credit union events and functions.
- Excellent oral and written communication skills with exceptional influencing skills.
- Ability to work effectively as a team member.
- Strong analytical and problem solving skills.
- Demonstrate problem-solving, teamwork abilities and ability to be proactive
- Adds value to the broader team and can diplomatically handle conflict
- 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 safely and successfully perform the essential job functions consistent 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

Print Employee Name:

Employee signature:

Date:

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