



## JOB DESCRIPTION

**Job Title:** Member Service Representative

**Reports To:** Assistant Branch Manager/ Branch Manager

**Location:** Calumet City, Chicago Heights, Naperville, and Bourbonnais

**Revision Date:** 12/19

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### **Job Summary:**

Responsible for providing exceptional member service: including efficient and accurate transaction processing.

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### **Key Job Duties/Activities**

- Serve members at Teller window or drive through in a courteous manner.
- Process cash handling transactions; opening account, deposits, withdrawals, etc.
- Ensure all required documentation is completed for all transactions.
- Follow all policies and guidelines including internal security measures.
- Comply with Federal Regulations; Currency Transaction Reports, Monetary Instrument Log, etc.
- Place Reg CC holds when appropriate.
- Participate in all required training.
- Product Knowledge.
- Responsible for balancing daily within a reasonable time and with minimum differences.
- Maintain proper cash limits.
- Recognize potential fraud.
- Interact with Members to Cross-Sell Products and Services.
- Communicate effectively with members while maintaining a standard of courtesy and professionalism.
- Support the credit union's community involvement and participate in community activities as needed.
- Resolve member issues timely and professionally.
- May assist in opening and closing of facility.
- Issue ATM/Debit cards.
- Scanning of daily work.
- Perform other duties as directed by Supervisor.

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### **Organization:**

Help maintain a positive teamwork environment by proactively assisting other coworkers when needed as well as actively participating and contributing during meetings.

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## **Compliance:**

This role requires keeping in compliance with company procedures and policies. Ensure compliance with operational, security and control policies/procedures, preventing fraud and protecting customer assets.

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## **Job Requirements:**

- Excellent organizational skills and the ability to multi-task.
- Individual should be a self-starter and have an interest in learning.
- Work with common PC software, including knowledge of Microsoft Office software for word processing and spreadsheets.
- Excellent communication and interpersonal skills.
- Able to communicate and function professionally with all levels of personnel across the organization.
- Strong prioritization skills.
  - ❖ Bilingual is a plus.
  - ❖ Previous credit union experience is a plus.

## **Other Requirements**

- Must be able to stand 8 hours straight.
- Capable of lifting a 5lb box.
- Able to use a phone and keyboard.
- Must be available to work on Saturday.
- Perform basic math and cash handling.
- Possess critical thinking skills.