

**KAUAI GOVERNMENT EFCU
Job Description**

Job Title: Member Services Representative	Effective Date: 05/10/2019
FLSA Status: Non-Exempt	
Reports to: Member Relations Manager	
PURPOSE AND SCOPE	
<ul style="list-style-type: none"> • Provides support to members including, but not limited to, processing financial transactions, opening new accounts and services, assisting with the use of credit union products and services, and accepting credit card and consumer loan applications. • Deepens member relationships by delivering superior service, effectively identifying member needs, and providing personalized solutions. 	
ESSENTIAL JOB FUNCTIONS	
1. Processes financial transactions such as deposits, withdrawals, and payments. Opens new accounts while effectively cross-selling appropriate products and services based on member need. Reconciles cash drawer as needed.	
2. Completes back-office financial services duties to facilitate service to members. Such duties may include, posting mail and night deposit transactions, scanning checks and other documents, ordering cards, completing and filing paperwork, and mailing notices.	
3. Maintains a thorough knowledge of the credit union's deposit and loan products and services. Applies that knowledge in turning routine transactions into opportunities to deepen member relationships and improve members' financial well-being.	
4. Answers member inquiries regarding the credit union and their accounts. Takes ownership of situations in order to find a positive resolution.	
5. Assists with vault transactions and balancing.	
6. Must comply with applicable policies, laws and regulations, including but not limited to the Bank Secrecy Act, the USA PATRIOT Act, Office of Foreign Assets Control, and the Equal Credit Opportunity Act.	
7. Performs other work as assigned.	

SUPERVISION RECEIVED
<ul style="list-style-type: none"> • Work with direct supervision from the Member Relations Manager. • Empowered to solve problems in a professional and timely manner. • Exercise discretion and independent judgment in tasks/situations detailed in departmental procedures.

MANAGEMENT/SUPERVISORY RESPONSIBILITIES

Directly Supervises: NONE

IDEAL EDUCATION AND/OR EXPERIENCE

- High School diploma and
- Two years customer service experience

For Internal Promotions:

- Above average performance rating from the previous two annual performance evaluations, and
- Financial institution related educational courses/seminars (e.g., HCUL, CUNA, FEAH, etc.) as recommended by management.

IDEAL CERTIFICATES, LICENSES, REGISTRATIONS

NONE

IDEAL KNOWLEDGE/SKILLS

Must be able to communicate (verbally and in writing) clearly in the English Language.

REASONING/DECISION-MAKING/PLANNING ABILITY

Must be able to make good decisions dealing with members, employees, and the public in a timely manner.

CUSTOMER/MEMBER INTERFACE

Daily and direct face-to-face contact with external or internal customers or members; may be followed up with correspondence, telephone, electronic messaging, etc.

PHYSICAL DEMANDS

Work Environment:

- “Moderate” noise level in an enclosed air conditioned facility (e.g., office with computers, printers, work area with light traffic, telephones, etc.).

- Usually indoor work with occasional work outdoors.
- Must be able to lift, push, and pull a minimum of 25 lbs.
- Must be able to operate office equipment such as: computer, typewriter, fax, telephone, photocopier, and calculator.
- Position may require prolonged sitting, standing, and walking.

TRAVEL REQUIREMENTS

Some travel may be required to attend meeting/educational offerings by car or aircraft to various locations throughout the United States. The length of the travel varies by purpose.

ATTENDANCE REQUIREMENTS

Please note that scheduled attendance requirements may change due to business needs.

Scheduled days of work when the credit union is open:

Monday, Tuesday, Wednesday, Thursday from 7:40 a.m. – 4:40 p.m.

Friday staggered shifts (CU hours: 8:30 a.m. – 6:00 p.m.)

Must be able to work additional hours, weekends, and Holidays as needed.

KGEFCU
Member Services Representative

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I acknowledge that I have read the job description associated with the position that I now hold. I understand that revisions to this job description may occur. I further understand that I may be assigned projects or duties, as needed that may not be specifically listed in the written job description.

I further understand that if I cannot perform the necessary functions of this job, with or without reasonable accommodations, that I may be dismissed from this position and/or the company.

I understand that I have entered into my employment relationship with the company voluntarily and acknowledge that there is no guarantee of a specific length of employment. I acknowledge that this job description is not a contract, or a legal document. Accordingly, either the company or I may terminate the relationship at will with or without cause, at any time, so long as there is no violation of applicable federal or state law.

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Employee Signature

Date