



northwest **plus** credit union

POSITION TITLE: Member Service Representative
REPORTS TO: Operations Director
SUPERVISES: No One
LOCATION: Credit Union Branches

Bilingual highly preferred English/Spanish

MUST BE ABLE TO WORK AT ANY OF OUR BRANCH LOCATIONS:
Burlington, Stanwood, Arlington, Marysville, Everett, South Everett/Mill Creek.

I. Basic Responsibilities

Provide exceptional service to our members and expand member service relationships by handling member financial transactions. Accurately and efficiently process and record routine transactions including cashing checks, accepting deposits and withdrawals, processing loan payments and money transfers. Promote and advise on credit union product and services.

II. Essential Functions

To perform the job successfully, an individual must be able to perform each essential duty satisfactorily. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- a. Contributes to NW+'s mission statement and goals by providing the highest quality of service, treating each person professionally – with warmth, courtesy, and respect, cross-selling additional services, and making a personal effort to make members feel they belong and are important to the credit union.
- b. Initiates and opens new accounts.
- c. Provide account services to members by receiving deposits and loan payments, cashing checks, issuing withdraws, and recording night and mail deposits.
- d. Answers questions in person or on the telephone and refers members to other services as necessary.
- e. Cross-sells financial products by answering inquiries, informing members of new services and product promotions, and understand member needs.
- f. Maintains member confidence and protects credit union operations by keeping information confidential.
- g. Actively contribute to branch business goals, as well as individual sales and member service goals.



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- h. Employs sound judgement, maintains knowledge of and, using decisions-making skills, adheres to all standards on internal and external policies and procedures and BSA regulations.
- i. Demonstrates good risk management decisions, including displaying solid knowledge of guidelines for fraud prevention and robbery.
- j. Complies and stays up-to-date with applicable laws, regulations, and operational procedures.
- k. Maintains and balance the cash drawer on a daily basis by accounting for cash assigned, received, and disbursed.
- l. Performs such other member service functions that might be needed from time to time or takes on other clerical duties when required as assistance in every department may be require from time to time.

III. Education and Skills Required

Education

- 1. High School Diploma or equivalent
- 2. Experience with handling cash and interacting with consumers in a retail or service-based environment.
- 3. 1-2 years of experience as a teller or in a related field preferred.

Skills

- 1. Must be able to add, subtract, multiply, and divide.
- 2. Ability to represent the credit union in a positive, professional manner in person, on the telephone and in written correspondence.
- 3. Ability to maintain strict level of confidentiality and security in sensitive areas.
- 4. Ability to operate routine office equipment.
- 5. Flexibility and capacity to manage many responsibilities simultaneously.
- 6. Ability to exercise independent judgment and make sound decisions.
- 7. Ability to organize projects, to prioritize workflow, and complete multiple tasks simultaneously and accurately.

IV. Working Conditions

Physical Demands

- 1. Occasional sitting, standing and walking.
- 2. Occasional lifting, pushing, pulling, or carrying up to 20 pounds.
- 3. Frequent use of hands in repetitive tasks such as simple grasping, typing motion, and twisting/turning of wrists.
- 4. Frequent finger manipulation to perform various clerical duties such as typing, filing, writing, and entering data into the computer system.



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Use of Senses

1. Frequent talking and hearing in person and on the telephone.
2. Frequent periods of time viewing a computer monitor, clarity of vision at 20 inches or more.

Mental Demands

1. Frequent interaction with others.
2. Frequent deadlines to meet.
3. Frequent alertness, precision, and concentration to ensure accuracy of transactions.
4. Frequent use of initiative and problem-solving ability on routine matters.
5. Frequent performing of basic numeric calculations, as well as writing, reading, comparing, and analyzing.

Environmental Demands

1. Normal workday occasional overtime.
2. Exposed to potentially hazardous conditions, i.e. Robbery.

NOTE: Job descriptions are not intended, and should not be constructed to be exhaustive lists of all responsibilities, skills, efforts, or working conditions associated with the job.

The credit union is an Equal Opportunity employer. Background reviews, including criminal and credit histories conducted prior to selection.