

## POSITION DESCRIPTION

### CCCU MISSION STATEMENT

**Our mission is to partner with members and ministries to help them become better stewards and achieve their financial goals.**

### VISION STATEMENT

**Making a positive difference.**

<b>CLASSIFICATION:</b>	<b>MEMBER SERVICE ASSOCIATE</b>
<b>FLSA STATUS:</b>	<b>NON-EXEMPT</b>
<b>REPORTS TO:</b>	<b>ASSISTANT VICE PRESIDENT, MEMBER SERVICE VICE PRESIDENT, MEMBER SERVICE</b>
<b>DEPARTMENT:</b>	<b>MEMBER SERVICE – NEW ACCOUNTS</b>
<b>LOCATION:</b>	<b>SAN DIMAS</b>
<b>HOURS:</b>	<b>MONDAY–THURSDAY, 8:30am to 5:30pm; FRIDAY, 9:15am to 6:15pm; SATURDAY (rotating), 9:00am to 1:00pm (Flexible 40 hours per week) Management reserves the right to modify the work schedule as necessary.</b>

#### **GENERAL RESPONSIBILITIES:**

The primary responsibility of this position is to assist Christian Community Credit Union to live out its Mission and Vision daily, in every member and/or staff interaction. This position is responsible for providing outstanding service in every service interaction. A key element of this outstanding service is to identify the needs of our members and recommend an appropriate solution that will help them become better stewards and achieve their financial goals.

Cultivate and retain member accounts by determining the nature and extent of each member's financial service needs and make them aware of additional services and accounts available; give each member the best possible service; actively sell and promote the Credit Union's full line of investments and financial services in person, over the phone and in writing.

Employee is empowered to meet member needs and resolve disputes at the initial point of contact in as quick a manner as possible, using any appropriate resources available within the scope of his/her abilities and pre-approved guidelines.

#### **PRINCIPAL ACCOUNTABILITIES:**

- Immediately greet, assist, and direct all members/visitors with a positive, confident & helpful manner
- Be aware of visitors entering the Credit Union; notify management if anything suspicious is observed or occurs, and implement proper security procedures
- Ensure members/visitors receive prompt attention; act as liaison between members/visitors and staff, directing them to the appropriate staff as necessary
- Represent Christian Community Credit Union with a professional image
- Stay current and keep informed on all Credit Union products & services, policies, goals and practices
- Maintain the privacy of our member accounts at all times
- Be familiar with eligibility guidelines
- Provide quality member service via mail, phone, email, fax and other channels
- Maintain extensive in-person contact with members regarding member-service related questions

- Proactively educate members on CCCU products and services using product knowledge and rapport dialogue
- Effectively communicate how the available account types benefit members/applicants and assist them in the selection of the most appropriate one for their needs
- Recognize and generate cross-sell opportunities for Credit Union growth and retention
- Perform tasks associated with online applications, new account processing, account closures, Certificate of Deposit renewals and other account maintenance requests
- Assist members in completing loan applications, general loan inquiries, and provide loan-related information
- Process ATM/VISA Check Card requests for new cards, replacements and deletions
- Process ownership changes, deletions, and additions to existing accounts
- Assist members with wire transfer requests, stop payments, statement & check copies, reconciling their checkbook, and general account inquires
- Prepare and accept account deposits, and process funds transfers
- Responsible to balance daily work
- Remain knowledgeable and competent when handling branch opening and closing procedures
- Work rotating Saturday shifts
- Maintain a neat and orderly lobby area
- Assist staff with member-service related questions when needed
- Be willing to continuously cross-train in all aspects of Member Services
- Deliver outstanding service that meets the expectations of our Service Promises. We promise to:
  - Honor God in how we serve you.
  - Exceed your expectations.
  - Appreciate our partnership.
  - Recognize your needs and recommend the best possible solution.
  - Treat your requests in a timely and confidential manner.
- Demonstrate enthusiastic support of corporate mission, core values and long-term objectives
- Meet or exceed the standard score on the annual product knowledge certification
- Meet or exceed service goals as established by the Credit Union
- Comply with all regulatory requirements for financial institutions, including but not limited to Bank Secrecy Act, Anti-Money Laundering, USA Patriot Act, OFAC & Fair Lending Regulations
- Apply knowledge and comply with all Credit Union systems, bylaws, policies, and procedures
- Responsible for knowledge of Reg CC and Reg D
- Perform other related duties as assigned

## **REQUIREMENTS:**

High School Diploma or equivalent required

Minimum two years of customer service experience required

Knowledge of word processing (Word preferred) and spreadsheets (Excel preferred)

Banking experience preferred

Knowledge of credit union products and services preferred

Bilingual skills (English/Spanish) preferred

Ability to display a positive and energetic outlook daily, representing the desired company image

Excellent interpersonal skills: courtesy, tact and diplomacy; frequent contact with others inside and/or outside the organization generally giving or obtaining information

Ability to deal effectively with multiple tasks and interruptions

Excellent organizational skills

Ability to handle interruptions and give direction with confidence

Ability to prioritize, effectively manage time, and work under pressure

Ability to sit and/or stand at a desk for extended periods of time

Ability to cross-sell services

Ability to embrace departmental/organizational changes

Continual cross training as required

Reliable transportation, valid driver's license, and current car insurance (when driving for Credit Union business)  
Good telephone techniques: strong, confident, friendly voice with good diction  
Ability to communicate effectively in both verbal and written formats with individuals  
Accurate typing at 25 wpm  
Professional appearance  
Ability to exercise confidentiality  
Ability to work as part of a team  
Regular attendance and punctuality  
Ability to lift 25 lbs.  
English literacy

**This job description is to be used as an employee guideline. Management reserves the right to amend this job description if necessary.**

Classification Specification for:

**Member Service Associate, San Dimas**

***Physical Requirements*** - The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodation may be made to enable individuals with disabilities to perform the essential functions.

<b>While performing the essential functions of this job, the employee:</b>	<b>Occasionally (up to 3 hours per work day)</b>	<b>Frequently (3 - 6 hours per work day)</b>	<b>Regularly (more than 6 hours per work day)</b>
Sits		X	
Stands		X	
Walks	X		
Bends neck or waist	X		
Twists neck or waist	X		
Stoops or kneels	X		
Uses hands to finger, handle or grasp	X		
Repetitively uses fingers		X	
Reaches, pulls or pushes below shoulder level	X		
Reaches, pulls or pushes above shoulder level	X		
Lifts and carries	Up to 25 lbs.		
Talks			X
Hears			X
Sees			X
Drives a vehicle	N/A		

***Work Environment*** - The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodation may be made to enable individuals with disabilities to perform the essential functions.

<b>Working Condition:</b>	<b>Description:</b>
Mobility	Moderate
Noise Level	Moderate
Hazardous	Minimal

***Acknowledgment***

I certify that I received a copy of this Classification Specification and I have read and understand what is required of me to meet the performance standards of the job.

<b>Signature:</b>	<b>Date:</b>
<b>Name (Printed or Typed):</b>	