



### **CCCU PURPOSE/MISSION**

To serve Christ followers to live and give more abundantly

### **CCCU VISION**

Build a community of Christ followers who transform our world through their lives and generosity

### **POSITION DESCRIPTION**

**CLASSIFICATION:** FULL-TIME BRANCH TELLER, GRADE 4

**FLSA STATUS:** NON-EXEMPT

**REPORTS TO:** VICE PRESIDENT, MEMBER SERVICE  
EXECUTIVE VICE PRESIDENT, CHIEF OPERATING OFFICER

**DEPARTMENT:** MEMBER SERVICE - TELLERS

**LOCATION:** SAN DIMAS

**HOURS:** MONDAY-THURSDAY, 8:30am to 5:30pm; FRIDAY, 8:30am to 6:30pm  
SATURDAY (rotating), 8:45am to 1:30pm (40 hours per week)  
Management reserves the right to modify the work schedule as necessary.

### **GENERAL RESPONSIBILITIES:**

The primary responsibility of this position is to assist Christian Community Credit Union to live out its Purpose/Mission 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 our Member Promise, which is to provide the right financial solution to help them live and give more abundantly.

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 measure available within the scope of his/her abilities and pre-approved guidelines.

### **PRINCIPAL ACCOUNTABILITIES:**

- Process transactions for both CCCU & Shared Branch walk-in members
- Assist members making balance inquiries
- Payoff loans as requested; process work from in tray
- Close member accounts as requested by Operations personnel
- Process withdrawal checks and cashier's checks
- Assist in verifying cash from the Federal Reserve
- Assist in scanning and releasing checks to FIS throughout the day
- Balance cash drawer and deposits at day-end

- Assist in balancing Credit Union and closing at day-end
- Responsible for processing transactions accurately
- Sell travelers cheques and money orders
- Be flexible as work hours could be changed as necessary to meet the needs of CCCU
- 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
- Process mail transaction requests when needed
- Demonstrate enthusiastic support of CCCU's purpose/mission, vision, values, & long-term objectives
- Meet or exceed the standard score on the annual product knowledge certification
- Meet or exceed referral, sales and service goals 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 one year of customer service experience required

Cash handling experience preferred

Banking experience preferred

Cross-selling and/or sales experience preferred

Bilingual skills (English/Spanish) preferred

Ability to work on computers

Ability to work under pressure

Ability to work with supervision and follow instructions

Reliable transportation, valid driver's license, and current car insurance (when driving for Credit Union business)

Good communication skills

Good math aptitude and attention to detail

Typing at 20 wpm

10-key by touch at 20 kpm

Ability to exercise confidentiality

Regular attendance and punctuality

Ability to work as part of a team

Professional appearance

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:  
**Full-Time Branch Teller, 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.

While performing the essential functions of this job, the employee:	Occasionally (up to 3 hours per work day)	Frequently (3 - 6 hours per work day)	Regularly (more than 6 hours per work day)
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.

Working Condition:	Description:
Mobility	Minimal
Noise Level	Minimal
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>	