

Evergreen Credit Union is seeking a highly motivated and organized individual to join our team as an Associate Financial Services Representative for our Broadway, South Portland Office. The role of the Associate Financial Services Representative is versatile. The candidate will assist members and potential members with discovering and/or uncovering their financial needs. The Associate FSR should be able to professionally explain products and services of the credit union. They will establish new accounts, assist members with issues and account problems, and act as a resource and liaison, by directing members to the appropriate individual or team for assistance. Evergreen Credit Union (ECU) has been chosen as one of the Best Places to Work in Maine for the past 5 years running. At ECU you can build a career path and make lots of friends while doing it. We have fun!

The Associate FSR will be expected to comply with all laws and regulations pertaining to job function such as Fair Lending, HMDA, and MLA. Follows all Bank Secrecy Act policies and procedures.

### **Duties and Responsibilities**

- Assists members with identifying their financial needs, opening and closing accounts, answering questions about products and services, and resolving member problems that are within their scope of authority. Refer problems that are beyond their scope of authority to their supervisor or designee along with the appropriate recommendations.
- Identify opportunities to cross-sell products and services to help members achieve their financial goals.
- Validate and correctly input member information into the Evergreen computer system, to ensure that records can be maintained and documents accurately prepared.
- Act as liaison between the member and other individuals and departments.
- Perform other related duties as assigned.

### **Benefits**

We offer an excellent compensation and benefit package that includes medical insurance, dental insurance, vision insurance, 401(k) with match, PTO, paid holidays, short-term and long-term disability insurance, and education assistance.

### **Experience**

- Six months to two years of similar or related experience.
- A high school education or GED.
- Significant level of trust and diplomacy is required, in addition to normal courtesy and tact. Work involves extensive personal contact with others and/or is usually of a personal or sensitive nature. Work may involve motivating or influencing others. Outside contacts become important and fostering sound relationships with other entities (companies and/or individuals) becomes necessary.
- Working knowledge of Excel and Access, preferred.

- Working knowledge of regulations relating to all Credit Union consumer and equity lending products.

This position reports to the Assistant Vice President, Branch Manager. Resumes may be sent to Cathy Lestage, Vice President of Human Resources @ [clestage@egcu.org](mailto:clestage@egcu.org).

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