

**Evergreen Credit Union**  
**Structured Compensation - Job Description**  
**Financial Services Representative**

Data Year: 2023

Prepared On: 08/30/2023

---

|                    |                    |                      |            |
|--------------------|--------------------|----------------------|------------|
| Department:        | Operations         | Grade:               | 6          |
| Reports To:        | AVP Branch Manager | Classification:      | Non-Exempt |
| Supervises Direct: | 0                  | Supervises Indirect: | 0          |
| Approved By:       |                    | Effective Date:      | 01/01/2010 |
|                    |                    | Revised Date:        | 07/19/2021 |

**Role:**

To assist members and potential members with their Credit Union needs; explains services, sets up new accounts, respond to problems, and direct members to the appropriate people.  
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.

**Essential Functions & Responsibilities:**

- N 70% Assists members with opening and closing accounts, answers questions about products and services and resolves problems that are within their authority to resolve. Refers problems that are beyond their authority to their supervisor, along with their recommendations.
- N 10% Identifies cross-sell opportunities and cross-sells services to members.
- N 5% Maintains member account information on computer system.
- N 5% Assures that appropriate records are maintained and required reports are prepared.
- N 5% Acts as liaison between members and various organizations and departments.
- N 5% Performs other related duties as assigned.

**Performance Measurements:**

1. To provide prompt, accurate, courteous, friendly, timely and professional service to all members.(To assist members waiting in the lobby within five minutes; To answer telephone within X rings; To respond to all correspondence within XX hours).
2. To wait on an average of XXX members per month.
3. To process member transactions with zero errors.
4. To develop and improve knowledge and skills in Member Service Areas.
5. To sell a minimum of XX to XX new products per month.
6. To maintain a professional work environment and businesslike appearance.
7. To maintain a dependable record of attendance and timeliness.
8. To troubleshoot and resolve member and internal inquiries in a timely, friendly and accurate manner.

**Knowledge and Skills:**

Experience One year to three years of similar or related experience.

Education A high school education or GED.

Interpersonal Skills Work involves much personal contact with others inside and/or outside the organization for the purpose of first-level conflict resolution, building relationships, and soliciting cooperation. Discussions involve a higher degree of confidentiality and discretion, requiring diplomacy and tact in communication.

Other Skills Able to operate a 10-key calculator, typewriter, and computer keyboard.

Physical Requirements

Work Environment

**This Job Description is not a complete statement of all duties and responsibilities comprising the position.**

-----  
Printed Employee Name

-----  
Date

-----  
Employee Signature