

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

Data Year: 2022
Prepared On: 05/03/2022

Department:	Branch	Grade:	7
Reports To:	VP, Branch Administration	Classification:	Exempt
Supervises Direct:	0	Supervises Indirect:	0
Approved By:		Effective Date:	05/02/2022
		Revised Date:	05/03/2022

Role:

This team member will assist members and potential members with determining their financial needs at the Credit Union. Necessary skills are, but not limited to, member service, problem solving and resolution, identification of solutions to member financial needs, establishment of new member relationship/accounts, and in some cases directing member to alternative team members for additional support.

The ideal candidate will have a passion to serve others, an inquisitive mind, and the ability to ask open-ended questions in order to gather information and provide appropriate solutions.

Team members are expected to comply with all laws and regulations pertaining to job function such as Fair Lending, HMDA and MLA; and follow all Bank Secrecy Act (BSA) policies and procedures.

Essential Functions & Responsibilities:

- E 70% The Float FSR travels to all branches to assist in branch coverage. 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.
- E 10% Identifies cross-sell opportunities and cross-sells services to members.
- E 5% Maintains member account information on computer system.
- E 5% Assures that appropriate records are maintained and required reports are prepared.
- E 5% Acts as liaison between members and various organizations and departments.
- E 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 the same day.
2. To assist in all offices when needed, even with short notice.
3. To process member transactions with minimal errors.
4. To develop and improve knowledge and skills in Member Service areas.
5. To meet established goals 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 customer service or sales experience.
- Education A high school degree, GED, or higher educational achievement.
- Interpersonal Skills Work involves extensive personal contact with others and is of a personal or sensitive nature. Motivating, influencing, and/or training others is key at this level. Outside contacts become important and fostering sound relationships with other entities (companies and/or individuals) becomes necessary and often requires the ability to influence and/or sell ideas or services to others.
- Other Skills Ability to operate various office equipment, including a calculator, computer, and various computer systems.
- Physical Requirements Must possess sufficient manual dexterity to skillfully operate office equipment including but not limited to the scanner, a computer, photocopier and telephone. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.
While performing the duties of this job, the employee is occasionally required to stand; walk, sit; use hand to finger, handle or feel objects; reach with hands and arms; balance; stoop; kneel, crawl or crouch; talk or hear. The employee may occasionally lift up to 20 pounds.
- Work Environment Business office.

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

Printed Employee Name

Date

Employee Signature