

The Summit Federal Credit Union

Member Service Specialist

I. Basic Function:

The primary function of the Member Service Specialist (MSS) is to assist our members within the branches in a friendly, helpful, professional and timely manner. This may be on the teller line, at the Member Service desk, or by processing loan documents. It is essential that the Member Service Specialist provides members with accurate information on the credit union services and responds to any questions, concerns and/or complaints in an effective and professional manner.

II. Essential Functions:

Member Service:

- Display excellent telephone and interpersonal skills being able to interact comfortably with members either over the telephone or face to face.
- Promote and "cross-sell" credit union products and services. Inquiries regarding loan products should result in a loan application.
- Witness loan documents insuring that all loan documentation is completed and signed properly prior to the disbursing of loan funds.
- Adhere to credit union and departmental policies and procedures.

Teller Area:

- Adhere to credit union policies and departmental procedures.
- Promote and cross-sell credit union products and services that best suit our member's needs.
- Responsible for accurately processing deposits, withdrawals, loan payments, line of credit transactions, money orders, traveler cheques, bank checks and promotional items in a timely manner.
- Ensure proper procedures for check cashing and withdrawals: Includes I.D., endorsements and check

holds.

- Accurate completion of various daily logs including balancing, money orders and traveler cheques.

Loan Documentation Retrieval:

- Insure all loan documentation (including disclosures, required letters, checks, etc.) is completed and ready for the member prior to the requested pick up time.
- Verify all information in the system insuring the utmost accuracy.
- Obtain the appropriate management authorized signature for all loan checks in excess of \$25,000.
- Process any member loans from beginning to completion in the event of an emergency or miscommunication in scheduling.

III. Other:

- Prepare workstation at the beginning of each day and ensure proper inventory of supplies throughout the day.
- Assist members in completing Certificate of Deposit request.
- Complete Individual Retirement Accounts (IRA's) as requested by members. Completed forms to be given to MSR for processing.
- Enter loan application requests on the application system.
- Assist others in various duties upon management's request.
- Participate in special projects as assigned by management.
- Work overtime when requested by management.

IV. Qualifications:

Skills:

- Strong communication and keyboarding skills.
- Four to six months cash experience, strong math, communication and keyboarding skills required.

Working Environment:

- Must be able to sit and/or for extended periods of time in a normal office environment.

*Note: The above information on this job has been designed to indicate the general nature and level of work performed by employees within this classification. It is not designed to contain or be interpreted as a comprehensive inventory of all duties, responsibilities, and qualifications required of employees assigned to this job.