

JOB DESCRIPTION

Position: Member Service Representative
Reports to: Assistant Manager

Group: 2

Primary Responsibility/Basic Purpose:

Under general supervision, the Member Service Representative 2 provides a full range of member driven transactions with respect to all credit union services (deposit and some lending products). Coastal Community strives "to be the leaders in building relationships that improve financial health, enrich people's lives and build healthier communities". It is the responsibility of the Member Service Representative 2 to be the primary point of contact for members and carry the vision statement forward in order to build, maintain, attract and expand the member's relationship with Coastal Community.

Representative Duties:

1. Provide sales and service expertise to inform members of new products/services and changes to existing products/services.
2. Identify and actively pursue internal referral opportunities to develop business; as well as work to achieve sales objectives.
3. Complete member driven requests, ensuring that documentation is started and/or completed and/or appointments scheduled to finalize all documentation, including but not limited to opening new memberships.
4. Initiate/complete member applications for a variety of products including but not limited to registered and non registered products, Mastercards and campaign Quick Loans.
5. Handle member inquiries ensuring proper resolve on all matters. Confidently resolve member concerns/issues should they arise.
6. Complete preliminary estate documentation with executors.
7. As required, authorize transactions of other employees within own signing limits and provide guidance to same.
8. Performs other related duties as required.

Required Qualifications:

- Minimum of one year financial service experience or an equivalent combination of education and experience.
- Successful completion of CUIC 185 and/or CUIC 200.
- Successful completion of the MSR II course and exam.
- Solid working knowledge of all Coastal Community products and services.
- Solid working knowledge of the banking system.
- Solid Working knowledge of administration procedures and accounting.
- Above average MSR skills.
- A proven sales record.
- Actively pursuing the CUIC Fellowship Designation and/or other related education.
- Excellent written and verbal communication skills.
- Demonstrated leadership skills.

Required Abilities:

- Proficient with the Windows suite of programs.
- Ability to utilize sound judgement in developing recommendations.
- Ability to build member relationships resulting in expanded share of wallet.
- Ability to multitask while providing quality service.

Skills to Benefit this Position Include:

- Member Service Skills
- Time Management Skills
- Interpersonal Skills
- Problem Solving Skills

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