



## Member Service Representative I

<b>Department:</b>	Branch Services
<b>Reports To:</b>	Branch Manager
<b>Classification:</b>	Non-Exempt G6
<b>Pay:</b>	\$19.00 (Min) – 23.75 (Mid) - \$28.50 (Max)
<b>Type:</b>	Full-Time
<b>Location:</b>	Glendora, CA

### Purpose:

As a Member Service Representative I, you will greet members/non-members entering the branch in a friendly, courteous manner and direct them to the appropriate staff. Answer calls promptly and courteously transfer to staff and provide support to all staff with clerical duties. The Member Service Representative I is responsible for building and maintaining relationships with members by providing exceptional service, processing transactions, and promoting credit union products and services.

### Major Duties and Responsibilities:

- Delivers exception service to members requesting account assistance.
- Provide consultative services to members regarding credit union products and services or refer members to the appropriate team member to assess the member's needs, address their concerns, and gain agreement.
- Processes member transactions efficiently and accurately with personal care. Contributes to the departmental goals by processing high volume with a sense of urgency.
- Actively identifies financial needs and makes appropriate credit union product or service recommendations to enhance members' relationships.
- May serve as primary vault custodian.
- Performs various file maintenance including processing requests for a change of address, check orders, and ordering ATM cards, etc. Performs, vault and night drop duties as assigned, and assists with the morning and evening preparation of the branch, and other team members as needed throughout the day.
- Performs other duties as assigned.
- Weekend hours may be required on occasion.
- Process member privacy opt-outs.
- Assist in the branch lobby is cleaned and maintained.
- Maintain supplies of new member packets.

### Expectations:

- Complies with regulatory compliance and assigned training requirements including but not limited to BSA regulations corresponding to their specific job duties. Failure to do so may result in disciplinary and other employment-related actions.
- Must complete FiCEP certification in 12 months of employment.

**Essential Functions:**

- Ability to perform duties as outlined under “Major Duties and Responsibilities.”
- Ability to communicate clearly and to be understood.
- Ability to stand increments of four hours.
- Ability to deal with sensitive and confidential information.
- Ability to work Saturdays or after normal business hours.
- Ability to work in a fast-paced and team-oriented manner.

**Qualifications and Educational Requirements:**

- High School Diploma or equivalent required.
- Prior experience in a customer service or hospitality role.
- Strong organizational and problem-solving skills.
- Demonstrate commitment to providing excellent customer service.

**Disclaimer:**

The above statements are intended to describe the general nature and level of work being performed by people assigned to this classification. They are not to be construed as an exhaustive list of responsibilities, duties, and skills required of personnel classification. All personnel may be required to perform duties outside of their normal responsibilities from time to time, as needed.

**ADA Compliance Statement:**

In compliance with the Americans with Disabilities Act (ADA), ACCU stands ready to accommodate any qualified employee with a disability who can perform the essential duties of their position, as long as necessary accommodations for that employee’s disability don’t cause an undue burden to the credit union.

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