



Lead Member Service Representative (Branch)

Department:	Branch Services
Reports To:	Branch Manager
Classification:	Non-Exempt, G8
Pay:	\$21.44 (min) – \$26.80 (mid) - \$32.17 (max)
Type:	Full Time
Location:	Glendora, CA

Purpose:

Provides exceptional member service delivery to members visiting the branch or through voice channel. Provides detailed information and promotes credit union products and services to build relationships. Processes transactions in areas of savings, consumer loans, real estate loans and auxiliary credit union services. Handles most complex situations in specialty area of expertise. Acts as lead to assist Branch Management in functioning of branch.

Major Duties and Responsibilities:

- Assists the Branch Management to oversee the member services and teller services staff and operation to ensure member requests are handled in a prompt, accurate and professional manner with the highest level of member service.
- Leads and oversees successful onboarding of new membership / new account activities in the branch. Acts as the point of contact for branch staff when addressing queue inquiries.
- Assists Branch Management to ensure that in all aspects of savings, lending and teller administration, including account aiding, processing monthly IRA required minimum distribution; researches and resolves member inquiries, monitoring and controlling vault activity, daily balancing, ensuring proper levels of cash are available and high levels of security are maintained as well as special projects as assigned.
- Answers technical questions and gives transaction overrides. Contributes to supportive work environment, harmonious working relations and high employee morale.
- Ensures branch operations are conducted in accordance with established policies, procedures, and guidelines in alignment with regulatory requirements.
- Delivers exceptional member service delivery to members requesting account assistance. Provides consultative services to members regarding credit union products and services by assessing the member's needs, addressing their concerns and gaining agreement.
- Assists the branch with training of new team members and cross training of existing team members in area of specialty; keeps up to date with policy/procedure updates.
- Provides members with assistance on Trusts, IRAs, deceased, legal, and more sensitive account issues. Has thorough knowledge of complex savings products and processes including IRAs, deceased and legal.
- Provides members with assistance and information on Real Estate products and services. Refers applicants as necessary to Real Estate and acts as department resource for more complex Real Estate transactions.
- Assists branch team with face-to-face discussions regarding disputed loan decisions as needed.

- Assists team and members with complex loan requests and transactions.
- Has thorough knowledge of consumer loan processes.
- Processes new memberships, additional share accounts, savings services, loan requests and loan fundings as requested by member.
- Provides suggestions for streamlining department and credit union operations. Assists with completing projects and reports related to the department. Performs other related duties as assigned or requested.
- 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.
- May act in the capacity of the Assistant Manager in his or her absence.
- Performs other duties as assigned.
- Weekend hours may be required on occasion.

Expectations:

- Adhere to the principles and requirements of all applicable laws and regulations relating to your position and your ACCU employment, including but not limited to the Bank Secrecy Act (BSA), the anti-terrorism procedures of the Office of Foreign Asset Control (OFAC), and the Anti-Money Laundering (AML) provisions of the USA Patriot Act.

Essential Functions:

- Ability to perform duties as outlined under “Major Duties and Responsibilities.”
- Ability to communicate clearly and to be understood.
- Ability to deal with sensitive and confidential information.

Qualifications and Educational Requirements:

- High School Diploma required.
- Bachelor's Degree or equivalent years of experience preferred.
- 1-3 years of previous related experience preferred.
- Must complete FiCEP certification in 6 months of employment.

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.

To apply, please visit: AmericasChristianCU.com/Apply