



## **Member Service Representative**

CEFCU is currently searching for an experienced Member Service Representative. The successful candidate will provide prompt and courteous service to members by performing over-the-counter transactions by telephone and in person.

### **Duties and Responsibilities**

- Accurately and courteously completes members' requests for account transactions including deposits, withdrawals, transfers and loan payments. Balances cash and negotiable items at the end of each business day.
- Opens all types of savings accounts, including custodial and trust accounts, in compliance with CEFCU membership eligibility requirements and the Bank Secrecy Act (BSA).
- Speaks with members in person or by phone and explains and promotes Credit Union products and services.
- Sells Mastercard gift cards and travel cards.
- Processes incoming and outgoing wires, ACH credits/debits and check requests.
- Prepares Payroll Deduction Authorization forms and allocations for accounts.
- Prepares and processes stop payment forms.
- Processes verifications of deposit.
- Updates account information with proper documentation.
- Adds flags and memos on possible compromised accounts at member request.
- Closes accounts upon request with proper identity verification.
- Provides Currency Transaction Reports (CTRs) information to Risk Management Officer for filing, as required by BSA.
- Assists other branch employees or Manager in all dual control functions including:
  - Balancing vault cash
  - Accepting and verifying gift cards and travel cards
  - Balancing negotiable items
  - Removing deposits from night depository
- Assists members with safe deposit box access.
- Accepts, reviews and applies Power of Attorney (POA) authorizations.
- Provides members with certification of trust documents.
- Performs other duties as assigned.
- Performs all duties in compliance with credit union policies, procedures, and appropriate regulatory statutes.

### **Qualifications and Requirements**

- High school diploma or general education degree (GED); or two to three years related experience and/or training; or equivalent combination of education and experience.
- Minimum three years' experience as a teller or in branch operations in a financial institution.



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- Excellent customer service skills.
- Basic knowledge of financial products and services required, in addition to working knowledge of credit union/banking regulations.
- Must be proficient in the use of a PC with Windows-based programs.
- Working knowledge of the credit union's core system preferred.
- Use of a 10-key calculator, fax and copy machine.
- Ability to add, subtract, multiply, and divide in all units of measure, using whole numbers, common fractions, and decimals.
- Ability to read and comprehend simple instructions, short correspondence, and memos.
- Ability to write simple correspondence.
- Works independently with a minimum number of errors.
- Ability to develop effective working relationships with all staff at all levels.
- Ability to uphold confidentiality standards and exercise discretion and good judgment.
- California driver license and insurance, and be able to travel to the credit union's other branches as needed.
- Must be bondable by the credit union's insurance agency.

### **Salary Range**

- \$20.35 – \$30.52