



POSITION TITLE		DIVISION
MSR-I		Retail Banking
REPORTS TO:	DEPARTMENT	DATE
Assistant Head Teller/Head Teller, Assistant Branch Manager/Branch Manager	Retail Banking	December 8, 2011
SUPERVISES	FLSA	REVISED
N/A	Non-Exempt	February 20, 2019

GENERAL SUMMARY

Under general supervision, but following established policies and procedures, delivers exceptional customer service, aligned with the Credit Union’s core values and mission statement. Responsible for the efficient and effective delivery of products and services to members. Responds to questions and/or provides information upon request from members (internal and external). Assists members and potential members in understanding and utilizing Credit Union products and services. Provides members such services as opening new accounts, ordering checks, account maintenance, corrections, etc. Meets and exceeds individual sales goals and actively participates in all branch sales and marketing activities. Interviews and assists members complete loan applications, obtains pertinent loan information and prepares necessary paperwork to disburse loans.

MAJOR RESPONSIBILITIES

1. Maintains security and compliance with Credit Union Security Plan.
2. Opens new member accounts and provides information to new and prospective members by explaining and cross-selling Credit Union products and services. Completes forms for opening and processing all types of accounts, including share, share draft, money market, certificates, IRAs, etc.
3. Identifies perceived and unperceived financial needs of our members and actively cross-sells Credit Union products and services.
4. Performs teller transactions, both operational and sales oriented.
5. Maintains and services existing members’ accounts: address changes, names changes, check re-orders, wire transfers, stop payments, etc.
6. Originates, underwrites and closes Consumer Loans offered by the Credit Union.

QUALIFICATIONS:

Education

High school diploma or equivalent (GED) education required.

Experience/Skills/Knowledge:

1. Preferred: 2 years in member service and/or teller area of a credit union or other financial institution.
2. Excellent verbal, written, telephone and interpersonal communication skills. Must possess a strong service orientation and willingness to sell products and services.
3. Excellent organizational, analytical and problem-solving skills.
4. Preferred: Sales experience in a goal and/or commission-based customer service driven environment.
5. Preferred: General knowledge of loan origination, underwriting and documentation.
6. PC proficient including Microsoft Office (Word, Excel, Outlook) and the Internet.
7. Ability to function in a financial institution branch environment and utilize standard office equipment, including but not limited to: PC, fax, copier, currency counter, money order encoder, telephone, etc. Ability to lift a minimum of 25 lbs. (coin bags). Some travel required.

GENERAL DESCRIPTION:

In terms of physical requirements, this position requires work best described as:

Sedentary Light Medium Heavy Very Heavy

PHYSICAL TASKS:

- Standing/Walking - Frequent
- Hearing - Ability to receive information through oral communication (face to face and telephone). - Continuous
- Talking - Expressing or exchanging ideas by means of the spoken word (face to face and telephone). – Continuous
- Reading – Ability to receive information through fax, e-mail, and text messages – Continuous

AUDIO / VISUAL:

- Requires vision to perform work dealing with data, figures and computer screens. - Continuous

PSYCHOLOGICAL/MENTAL DEMANDS:

- Responds positively and productively to stressful internal (employee)/situations. - Continuous
- Assists others to work harmoniously and effectively as part of a work team. – Continuous

Employee's Signature _____ **Date** _____

Manager's Signature _____ **Date** _____

Human Resources' Signature _____ **Date** _____