

MEMBER SERVICES REPRESENTATIVE

FULL-TIME POSITION – ALTONA BRANCH

Job Purpose:

- To meet member needs through establishing a strong business relationship and promoting quality deposit products and services, directly or through referrals to service providers.
- To recognize member needs and promote and cross-sell all credit union products and services to members with courtesy and accuracy.
- To ensure all assigned FSO activities are in compliance with relevant legislation, regulations, policies and procedures.

Specific Responsibilities:

- Delivery of Cash Related Services to Members
 - Process member transactions such as deposits, withdrawals, loan and utility payments, money orders, calculation of foreign and domestic exchange, cheque cashing, certified cheques, transfers between accounts, government remittances, post wires transactions, post stop payments, set-up Pre-authorized Transfers.
 - List and balance outgoing cheques, and balance all transactions, vouchers and cash to blotter and terminal daily within established time frames.
 - Adhere to security procedures as they pertain to the position.
 - Prepare statements for mailing and distribution.
 - Answer telephone calls and make appropriate referrals.
 - Issue debit cards.
 - Order Davis and Henderson cheques.
 - Inspect rejected cheques for variances in body and figure, date, signature and endorsement.
 - Make appropriate G/L entries as indicated by type of transaction.
- Sales, Marketing and Promotion
 - Maintain up-to-date knowledge of all credit union products and services by regularly reviewing literature and attending product updates held at the credit union.
 - Explain differences between credit union and competitor products and services.
 - Recognize member needs and promote and cross-sells credit union deposit services to members by explaining basic credit union products and services, answering basic questions and referring more complex requests for information and assistance to appropriate branch staff.
 - Foster business development through service excellence and product knowledge.
 - Provide input into the development and support achievement of sales targets and marketing plans.
- Department/Work Unit/Credit Union Support
 - Train and support team members as required.
 - Co-operatively and actively participate in department/work unit and credit union meetings.
 - Provide relief for other positions as required.
 - Any other duties as assigned.
 - Promotion and Sales of Non-Cash Related Deposit Products
 - Respond to members' inquiries by providing information on the full range of deposit products and services.
 - Analyze member needs and assists members to utilize the product or service which best meets those needs by outlining benefits and alternatives and advises on the best match; cross-sell all credit union products.
 - Process member transactions such as new accounts, RRSP, RESPs, RRIFs, TFSAs, and term deposit sales and withdrawals.
 - Process member requests for account updates, balances, cheque orders, chequing statements and account closures as well as stop payments, various Member card inquiries, error corrections.

- Resolve routine problems with member accounts and deposit instruments referred by members and other branch staff.
- Sales, Marketing and Promotion
 - Solicit new members to join; foster business development through service excellence and product knowledge.
 - Listen to members, answer basic questions and refer complex questions. Match member needs to credit union products and services, sell credit union products.
 - Differentiate between credit union and competitor products and services.
 - Maintain up-to-date knowledge of all branch deposit-oriented products, services and competitors' offerings by regularly reviewing literature and attending product updates; input technical data into computer online systems to reflect deposit product changes.
 - Department/Work Unit/Credit Union Support
 - Relieve other staff as required.
 - Train and support team members as required.
 - Answer telephone calls and make appropriate referrals.

The Ideal Candidate:

- Grade 12 diploma and one year of job related experience, or an equivalent combination of education and experience.
- Should be a self-motivated individual with a pleasant attitude, be highly organized, have strong computer skills, and possess a confident ability to work independently while still remaining a team player.
- Should have good people-skills

Please forward your note of interest in this position by **July 25, 2022** to either Janae Dueck or Rick Friesen.

Thank you in advance for considering this opportunity for movement within our organization!