

Company Name:	Advia Credit Union
Job Title:	Part-Time Teller
Department/Group:	
Location:	Kalamazoo, MI
Position Type:	Part-time

Job Description

ROLE AND RESPONSIBILITIES

The most essential function of this position is to assist in creating an exceptional experience for the members of the Credit Union. This is accomplished by providing outstanding service and next best product recommendations to both internal and external members as defined by living and demonstrating the core values of the credit union; Act with Integrity, Drive Progress, Build & Strengthen Relationships and Keep People at the Core. Responsible for accurately processing financial transactions and being an effective source of information for our members. Provides friendly, professional, confidential and effective assistance to members by offering educational benefits of saving money and time, making money or and adding convenience and giving the member piece of mind.

As a part time teller, you will have opportunities to:

- Interact with our members while building impactful relationships.
- Shape and sustain our companies image through excellent member service.
- Act as a pace setter for the sales markers in the branch.
- Develop sales and leadership skills through motivating team to meet sales goals.

Major Duties:

- Maintains high level of confidentiality to protect member information. This includes but is not limited to securing shredding at end of night, discard papers with member information in the shredding bin.
- Responsible for maintaining an effective working knowledge of all credit union products and services and department functions. Understands and can easily convey information regarding products and service to members.
- Proactively seeks ways to expand member relationships in order to provide them a great experience, to help improve the members financial standing and achieve individual, branch and credit union goals. This may include outbound calls, uncovering needs or referring solutions. Continuously and effectively uncovers the members' unstated needs to recommend products and/or services that will help the member, answer member inquiries and educates members. Ensures that each member interaction is maximized to provide great service and help improve the members financial standing.
- Works to create a flawless member experience with members by putting the member first and foremost with everything that is done. Manages member relationships and communication professionally, including a neat workspace and professional appearance.
- Demonstrate accuracy and efficiency with financial transactions for checking, savings and borrowing members: receives funds, posts transactions and pays out funds as requested. Verbally confirm intended transactions with member to assure needs are met and minimize redoing. Balances cash drawer daily to assure accuracy in transactions and notifies supervisor regarding any outages.
- Troubleshoots, researches and responds to member inquiries/complaints. Communicates with members regarding product and services (including but not limited to overdrafts, account closings, charges, fees etc) in person, via phone, email and mail etc. Responsible for handling objections and understanding the root cause of the issue.

- Must comply with applicable laws and regulations, including but not limited to, the Bank Secrecy Act, the Patriot Act, and the Office of Foreign Assets Control.

QUALIFICATIONS AND EDUCATION REQUIREMENTS

Experience

Cash handling and customer service experience is strongly preferred.

Education/Certifications/Licenses

A high school degree or equivalent

Interpersonal Skills

Courtesy and tact are essential elements of the job. Work involves personal contact with customers and others inside and outside the organization, generally regarding fairly routine matters for the purposes of giving and obtaining information or instructions, updating or referring. Communications require shorter and not in-depth discussions most of the time.

Physical Requirements

Perform primarily sedentary work with limited physical exertion and regularly lifting cash box of up to 10 lbs. and coin bags up to 50 lbs on occasion. Must be capable of climbing / descending stairs in emergency situation. Must be able to operate routine office equipment including telephone, copier, facsimile, and calculator. Must be able to stand for long periods of time. Must be able to routinely perform work on computer for an average of 6-8 hours per day, when necessary. Must be able to work extended hours whenever required or requested by management. Must be capable of regular, reliable and timely attendance.

Working Conditions

Must be able to routinely perform work indoors in climate-controlled shared work area with minimal noise.

Mental and/or Emotional Requirements

Must be able to perform job functions independently or with limited supervision and work effectively either on own or as part of a team. Must be able to read and carry out various written instructions and follow oral instructions. Must be able to speak clearly and deliver information in a logical and understandable sequence. Must be able to use basic math skills and spell accurately up to a high school graduate level. Must be capable of dealing calmly and professionally with numerous different personalities from diverse cultures at various levels within and outside of the organization and demonstrate highest levels of customer service and discretion when dealing with the public. Must be able to perform responsibilities with composure under the stress of deadlines / requirements for extreme accuracy and quality and/or fast pace. Must be able to effectively handle multiple, simultaneous, and changing priorities. Must be capable of exercising highest level of discretion on both internal and external confidential matters.

Acknowledgement

Nothing in this position description restricts management's right to assign or reassign duties and responsibilities to this job at any time. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. This job description is not a contract and should not be construed as a guarantee of employment for any specific period of time. Advia Credit Union is an Equal Opportunity Employer and does not discriminate against employees or applicants based on race, color, religion, sex/gender, national origin, disability, age, or any other category protected by law.

Company Name:	Advia Credit Union
Job Title:	Member Contact Specialist
Department/Group:	
Location:	Kalamazoo, MI
Position Type:	Full-time

Job Description

ROLE AND RESPONSIBILITIES

Receives incoming calls and determines the products, services or resources that the caller requires (or could benefit from). Provides direct support services to members; or, connects them with the appropriate staff representative.

As a Member Contact Specialist, you will have opportunities to:

- Have a large and tangible impact on members lives
- Experience a nice mix of member interaction while still being "behind the scenes"
- Increase your exposure to operations and consumer lending
- Be an important part of a fun, dynamic and high-performing sales and service team

Major Duties:

- Cross-sell electronic services and assist members in setting up electronic services enrollment and understanding the e-statement process.
- Perform teller functions for members (i.e. transfer funds between accounts and/or loan, stop payments, close and reorder debit cards, provide balances and last five transactions, reissue and reset pin numbers, process loan or credit card payments, etc.) to assure member's needs are addressed in a polite and friendly manner.
- Identify products/services that might be beneficial to customers and provides information about their value and benefit.
- Answer incoming calls, determines the needs of the caller and verify the caller's identity, minimizing the caller's time and effort in resolving their concern.
- Must comply with applicable laws and regulations, including but not limited to, the Bank Secrecy Act, the Patriot Act, and the Office of Foreign Assets Control.

QUALIFICATIONS AND EDUCATION REQUIREMENTS

Experience

Three years to five years of similar or related experience, including preparatory experience.

Education/Certifications/Licenses

A high school degree or equivalent

Interpersonal Skills

Courtesy and tact are essential elements of the job. Work involves personal contact with members, employees and others outside the organization, generally involving routine matters for the purposes of giving and obtaining information or instructions, updating or referring. Communications require shorter and not in-depth discussions most of the time.

Physical Requirements

Perform primarily sedentary work with limited physical exertion and occasional lifting of up to 5 lbs. Must be capable of climbing/descending stairs in an emergency. Must be able to operate routine office equipment including telephone, copier, facsimile, and calculator. Must be able to routinely perform work on computer for an average of 6-8 hours per day. Must be able to work extended hours whenever required or requested by management. Must be capable of regular, reliable and timely attendance.

Working Conditions

Must be able to routinely perform work indoors in climate-controlled shared work area with moderate noise.

Mental and/or Emotional Requirements

Must be able to perform job functions with supervision and work effectively either on own or as part of a team. Must be able to read and carry out various instructions and follow oral instructions. Must be able to speak clearly and deliver information in a logical and understandable sequence. Must be able to perform basic mathematical calculations with extreme accuracy. Must be capable of calmly and professionally dealing with numerous different personalities from diverse cultures at various levels within and outside of the organization and demonstrate highest levels of customer service and discretion when dealing with the public. Must be able to perform responsibilities with composure under the stress of deadlines/requirements for extreme accuracy and quality and/or fast pace. Must be able to effectively handle multiple, simultaneous, and changing priorities. Must be capable of exercising highest level of discretion on confidential matters.

Acknowledgement

Nothing in this position description restricts management’s right to assign or reassign duties and responsibilities to this job at any time.

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Advia Credit Union is an Equal Opportunity Employer of women, minorities, protected veterans and individuals with disabilities. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

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