

# **Family First Job Posting**

## Cross Functional Services Rep

**POSITION REPORTS TO:**     **Branch Manager**

**POSITIONS SUPERVISED:**   **N/A**

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### **POSITION PURPOSE**

Responsible for providing a variety of paying and receiving functions for members in person, via phone, and through the mail, including processing deposits, withdrawals, loan payments, cashiers' checks, money orders, and cash advances. Balances each day's transactions and verifies cash totals. Performs a broad variety of financial products and services functions such as opening and closing accounts, renewing certificates, and assisting members with bookkeeping and checking account problems. Answers members' questions regarding Credit Union products and services provided and performs a variety of account maintenance duties. Actively cross sells Credit Union products and services. Performs specific assigned jobs including various clerical and receptionist functions, and assists other FSRs, MSRs and call center with duties as required. Serves members promptly and professionally.

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### **ESSENTIAL FUNCTIONS AND BASIC DUTIES**

1.     **Assumes responsibility for the efficient, effective, and accurate performance of Teller functions.**
  - a.     Represents the Credit Union in a courteous and professional manner.
  - b.     Receives deposits and loan payments. Ability to processes cash advances, cashiers' checks, money orders, and wire transfers.
  - c.     Processes transfers. Verifies transactions. Monitors deposit amounts and examines documents for endorsement and negotiability. Detects and resolves discrepancies promptly.
  - d.     Opens and closes computer terminal daily. Processes assigned cash and transactions and balances end of day.
  - e.     Operates online teller terminal. Provides in person information that members may authorize concerning their account status.
  - f.     Performs drive-up, night drop, ATM and CDM/recycler functions as assigned.

- g. Assists members and potential members with their credit union needs. Explains services, sets up new accounts, and responds to problems.
- h. Helps assist and train other member service representatives in operations and referrals.

2. **Assumes responsibility for the effective and professional performance of financial service functions.**

- a. Assists members with opening and closing accounts, answering questions about products and services and resolves problems that are within their authority. Refers problems that are beyond their authority to the next level manager, along with their recommendations.
- b. Resolves member bookkeeping and checking account problems. Takes stop payment orders.
- c. Receives and directs members and telephone calls. Responds to inquiries and questions if possible or directs them as necessary. Records and relays messages.
- d. Performs file maintenance and account changes as needed.
- e. Keeps members informed of Credit Union products and services and policies, including types of available accounts, interest and dividend rates, payroll deduction options, and other related products and services.
- f. Maintains and projects the Credit Union's professional reputation. Maintains privacy of member account information.
- g. Articulate the benefits and features of our products and services. Actively cross sells Credit Union products and services.
- h. Take loans – follow-up from start to finish.

3. **Assumes responsibility for establishing and maintaining effective coordination and working relationships with area co-workers and with management.**

- a. Assists area co-workers as required.
- b. Keeps supervisor informed of area activities and of any significant problems or concerns.
- c. Completes required reports and records accurately and promptly.
- d. Attends meetings as required.
- e. Performs other job related duties as assigned.

4. **Assumes responsibility for related duties as required or assigned.**
  - a. Ensures work area is clean, secure, and well maintained.
  - b. Completes special projects as assigned
  - c. Ensures procedures are updated annually or as needed within area of responsibility
  - d. Maintains confidentiality

## **PERFORMANCE MEASUREMENTS**

1. Teller and Financial Service Representative functions are efficiently, effectively, and accurately performed in accordance with established policies, standards, and security procedures.
2. Monies are balanced and any discrepancies promptly resolved, as applicable.
3. Good business relations exist with members. Members' problems or questions are courteously and promptly resolved.
4. Actively cross-sell products and services to members to achieve or exceed all established sales goals and assist in meeting department goals.
5. Good working relationships and coordination exist with area co-workers and with management. Assistance is provided to other Financial Service Specialists and staff as needed. Supervisors are appropriately informed of area activities.
6. Ensure compliance with all applicable credit union policies and procedures.
7. Required reports and records are accurate, complete, and timely.
8. The Credit Union's professional reputation is maintained and conveyed.
9. Established production expectations are met or exceeded
10. Maintain a professional appearance, demeanor, and workspace

## **QUALIFICATIONS**

**EDUCATION/CERTIFICATION:** High school graduate or equivalent.

**REQUIRED KNOWLEDGE:** Knowledge of Teller and Financial Service Representatives operations and procedures.

Basic understanding of Credit Union operations.

*Cross Functional Rep*

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**EXPERIENCE REQUIRED:** Six months to two years of similar or related experience.

**SKILLS/ABILITIES:** Good communication skills.  
Good math skills and cash handling skills.  
Ability to operate related computer applications and business equipment including adding coin and money counting machines, and telephone.  
Cash handling.

**MATHEMATICS ABILITY:** Ability to perform basic math skills, use decimals to compute ratios and percent's..

### **MENTAL ACTIVITIES AND REQUIREMENTS OF THIS POSITION**

#### Language Skills

Professional tone with members and coworkers. Ability to prepare memos, reports, email, and all correspondence using proper punctuation, spelling and grammar.

#### Mathematics Ability

Ability to perform basic math computations.

#### Reasoning Ability

Ability to solve practical problems and deal with a variety of variables in situations where there may only be limited standardization. Able to interpret a variety of instructions in both written and oral form.