

# Branch Member Financial Specialist 1

GRADE	DEPARTMENT	JOB CLASSIFICATION	EEOC CATEGORY
6	Branch Operations	NonExempt	Administrative Support Workers

## Role

Responsible for providing a broad variety of member services such as opening and closing accounts, renewing certificate accounts, and assisting members with bookkeeping and checking account issues. Answers member questions regarding OCCU services provided and performs a variety of account maintenance. Assists or refers members with any and all questions or issues that may arise.

## Major Duties and Responsibilities

Weight	Function	Essential?
1. 40%	<p>Presents and explains OCCU products and services to members and assists in meeting their financial needs. Opens and closes accounts. Rents safety deposit boxes. Orders checks for member accounts. Completes payroll deductions and authorization forms. Answers questions and solves problems for members by listening, collecting data, securing answers and reporting results to the inquiring party. Resolves member bookkeeping and checking account issues. Takes stop payment orders. Renews and updates certificate accounts. Receives member inquiries and questions or directs them as necessary.</p> <p>Assumes responsibility for the efficient, effective and accurate performance of teller functions. Processes cash advances, cashiers checks, and similar transactions. Disburses cash or check share withdrawals, processes transfers, receives and processes payroll deduction starts, stops and increases. Maintains accuracy of member information and documentation.</p> <p>Processes assigned cash and transactions and balances at the end of the day. Verifies transactions. Monitors deposit amounts and examines documents for endorsement and negotiability. Detects and resolves discrepancies promptly.</p> <p>Transaction levels, balancing errors, etc. are in line with OCCU standards</p>	✓
2. 30%	<p>Resolves member requests and questions promptly, courteously and professionally. Keeps members informed of OCCU services and policies. Actively and professionally cross-sells OCCU's products and services.</p> <p>Assists with wide variety of member services including opening/closing of share certificates, maintaining safe deposit boxes, assisting members with checkbooks, processing credit card/loan applications, managing outgoing wires, solving fraud issues, notary services* (if applicable), etc.</p>	✓
3. 15%	<p>Assists area personnel as required. Keeps supervisor informed of area activities and significant issues. Completes required reports and records accurately and promptly. Attends all required meetings.</p>	✓
4. 10%	<p>Performs research and NSF duties as needed. Performs related clerical and secretarial duties as needed. Performs drive-up teller and night drop functions* (at applicable locations) as assigned. Ability to troubleshoot all aspects of ACH and debit transactions as well as answer any and all questions pertaining to those products.</p>	✓
5. 5%	<p>Maintains and projects OCCU's professional reputation. Maintains privacy of member account information. Ensures that work area is clean, secure and well-maintained.</p>	✓

Weight	Function	Essential?
6.	<p>—</p> <p>Performance Measurements</p> <ol style="list-style-type: none"> <li>1. The ability to communicate effectively, motivate and influence others.</li> <li>2. Assumes responsibility for establishing and maintaining effective coordination and working relationships with area personnel and management. Assistance is provided to other MFS and staff as needed. Supervisors are appropriately informed of area activities.</li> <li>3. Monies are balanced and any discrepancies are promptly resolved. Maintains a balancing record that meets the established standards.</li> <li>4. Member service functions are efficiently, effectively, and accurately performed in accordance with established policies, standards and security procedures.</li> <li>5. Good business relations exist with members. Member concerns or questions are courteously and promptly resolved. Effective assistance is provided with member bookkeeping and checking account issues.</li> <li>6. Professionally cross-sells OCCU products and services.</li> <li>7. Responsible for ensuring compliance with OCCU policies and procedures, applicable statutes and federal regulations. Required to attend or participate in necessary compliance training.</li> <li>8. Maintains a professional work environment and businesslike appearance.</li> <li>9. Ensures OCCU's mission statement, Core Values, Moments of Truth, and Service Standards are adhered to.</li> <li>10. Preserves confidentiality of OCCU records.</li> <li>11. A commitment to continuing education and learning while in the position.</li> <li>12. Must be a reliable team player and supportive of OCCU goals and decisions as they relate to the job.</li> <li>13. Develop an understanding of the credit union history, philosophy and organization.</li> <li>14. Attends all trainings and meetings as required .</li> </ol>	✓

## Knowledge & Skills

### Experience

Six months to two years of similar or related experience, including time spent in preparatory positions.

### Education/Certifications/Licenses

High school degree or GED required.

### Interpersonal Skills

Courtesy, tact, and diplomacy are essential elements of the job. Work involves personal contact with others inside and/or outside the organization, generally regarding routine matters for purposes of giving and obtaining information, as well as advising or referring, which commonly require shorter discussions.

### Other Skills

Good communication skills. Professional appearance, dress and attitude. Good math skills, the ability to operate related computer applications and business equipment including adding machine, copy machine, coin and money counting machines, and the telephone. Proficient PC skills, as well as applicable software program capabilities. Comfortable with Microsoft Office programs.

## ADA Requirements

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### Physical Requirements

Perform primarily sedentary work with limited physical exertion and occasional lifting of up to 10 lbs. 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 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 environment with moderate noise.

### Mental and/or Emotional Requirements

Must be able to perform job functions independently and with limited supervision. Must work effectively 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 perform basic financial calculations with accuracy. 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 stress of deadline, requirements for extreme accuracy and quality and/or fast pace. Must be capable of exercising highest level of discretion on confidential matters.

## Acknowledgement

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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.*

*Our Community CU 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.*