

**POSITION: MEMBER SERVICE REPRESENTATIVE/ LENDER AUW**

**REPORTS TO:** Regional Manager

**POSITION PURPOSE:** Under general supervision, and in accordance with established policies, procedures and regulations, accurately and professionally provides members with a variety of financial transactions. Sells and refers credit union products and services. Approves loan requests within established parameters.

**REQUIREMENTS:**

- Desire, ability and experience in working with and helping other people in a professional setting as demonstrated by a positive, enthusiastic attitude, exceptional interpersonal skills, professional business appearance, and previous work experience.
- Ability and desire to maintain quality of service while performing multiple tasks.
- Excellent oral and written communications skills.
- Working knowledge of computer software (i.e. Windows, Microsoft Office).
- Flexibility in scheduling. May require some travel.
- Attention to detail.
- Bondable.
- Successful completion of consumer lending training or equivalent experience.

**RESPONSIBILITIES:**

**A. Sales Productivity:**

- Meet individual sales goals as identified in your performance action plan.

**B. Sales Skills**

- Use a consultative selling approach as defined in "Wings Financial FCU's Professional Sales Skills Expectations" to determine the nature and extent of each member's needs and sell appropriate financial services to meet those needs.
- Actively cross-sell and make qualified referrals for additional appropriate loan, deposit and fee income products and services in person, over the phone and in writing

**C. Member Service Skills:**

- Provide members with courteous, friendly service, which exceeds their expectations while processing transactions promptly, efficiently and accurately.
- Follow Wings Financial FCU's "Standards of Professionalism" to represent the credit union to members in a professional manner through written and verbal communications, attitude, business attire, work area, and thorough knowledge of our products and services.
- Meet individual quality service goals as identified in your performance action plan.

**D. Operation & Teamwork Skills:**

- Accurately apply technical job knowledge and skills to complete all work in a timely manner in accordance with policies, procedures and regulatory requirements while managing varying degrees of work.
- Meet departmental goals and deadlines and individual performance goals as identified in your performance action plan.
- Be an effective team player through cooperation, flexibility, dependability, attendance, lack of tardiness, and participation at meetings and training.
- Perform various other duties as assigned.

**PHYSICAL REQUIREMENTS:**

Light work – predominantly standing or sitting for extended periods of time and some walking. Limited amount of force exerted in lifting, carrying or pushing objects. May exert up to 20 lbs. of force to move an object. Occasional stooping or bending may be required. Motor coordination, finger dexterity and manual dexterity. Reasonable accommodations may be made to enable individuals with disabilities to perform required functions.