

Financial Service Representative II (FSR 2)

Job Description

General Description

Summary:

This position provides a high-level member service and operational support to member inquiries via incoming calls, in-person visits, email, fax, or mail.

Principal Duties:

Responsible for opening all types of new accounts and handling other account related or deposit related requests. Resolves member inquires/complaints and identifies cross-sell opportunities by assessing member needs. Works directly with clients in all areas of operations (ex: check and savings inquiries, loan payments, wires, transfers, CDs, etc.). Provides members with accurate and timely information to ensure quality service and member retention.

Additional responsibilities above and beyond a FSR I include residential lending for members and Notary services.

Reports to:

This position reports directly to:

Branch Manager

Requirements

Working Conditions:

Able to regularly sit or stand for prolonged periods of time.

Extensive computer usage is required.

Moderate phone usage is required.

Able to lift a minimum of 25lbs.

Training / Experience :

High School Diploma or GED

NMLS

Notary

Prior customer service experience required.

Prior experience in banking or credit unions required.

Performance Guidelines

Guidelines:

- Provide members with exceptional service while living up to GVFCU core values and mission statement.
-

- Provide members with account, product and service information in response to inquiries.
- Resolve problems in an accurate and timely manner to ensure quality service and high member retention.
- Independently open new deposit accounts for members. Explain and review all account documentation and assume responsibility for proper documentation execution. Send documentation to members and follow up as needed.
- Research, analyze and resolve operational problems on member accounts and provide solutions with various GVFCU products and services.
- Recognize selling opportunities and effectively cross-sell GVFCU products and services.
- Perform teller duties of processing, paying and receiving transactions, preparing and processing incoming and outgoing wire transfers, foreign drafts and accepts and verifies large merchant transactions.
- Ensure member transactions are complete and accurate.
- Input, update, and maintain member records and files on GVFCU's core processing system.
- Process and follow up on new check orders, debit card orders, etc.
- Greet guests and members to provide general direction, and determine appropriate area of service.
- Perform administrative tasks as assigned.
- Understand and adhere to the Credit Unions Bank Secrecy Act policy and procedures and 'know your customer/enhanced due diligence' guidelines.
- Follow all Credit Union policies and procedures to ensure compliance with all laws and regulations.
- Participate in special projects, sales campaigns, and assignments as requested.
- May perform other duties as assigned.