

**KAUA'I FEDERAL CREDIT UNION
 Job Description**

Job Title: Member Services Representative		Effective Date: Nov 2022
FLSA Status: Non-Exempt		
Reports to: Member Services Representative		
PURPOSE AND SCOPE		
A Member Services Representative's (MSR) primary responsibilities are to deliver exceptional Member Service and deepen Member relationships by identifying needs and providing personalized solutions. MSR's must be knowledgeable about a range of credit union operations, able to process a variety of financial transactions, open and close accounts, and have the ability to answer a broad range of member questions.		
ESSENTIAL JOB FUNCTIONS		
1. Assist Members in processing transactions such as deposits, withdrawals, and loan payments. Open and close accounts. Accurately and efficiently process all transactions.		
2. Promote products and services that are beneficial to the Member. Maintain a thorough knowledge of the credit unions products and services.		
3. Maintain and balance the cash drawer daily, or as required. Reconcile discrepancies. May assist with completion of vault transactions and balancing.		
4. Completes additional functions as required such as: processing night deposit, answering calls, ordering debit cards, scanning documents, filing and other duties.		
5. Keeping a clean organized work area and professional appearance.		
6. Comply and stay current with applicable policies, laws and regulations, including but not limited to: the Bank Secrecy Act, the USA PATRIOT Act, Office of Foreign Assets Control, and the Equal Credit Opportunity Act.		
7. Demonstrate good risk management decisions, including displaying solid knowledge of guidelines for fraud prevention and robbery.		
8. Actively contribute to the credit union's business goals, as well as individual sales and Member service goals.		
9. Deliver an outstanding Member experience by exceeding expectations, thorough follow-through and actively taking responsibility for the overall experience.		

SUPERVISION RECEIVED
<ul style="list-style-type: none"> • Work with direct supervision from the Member Services Supervisor. • Empowered to solve problems in a professional and timely manner.

MANAGEMENT/SUPERVISORY RESPONSIBILITIES
Directly Supervises: NONE

IDEAL EDUCATION AND/OR EXPERIENCE
<ul style="list-style-type: none">• High School diploma or equivalent required.• 1-2 years customer service experience preferred.• Cash handling experience preferred.• Basic knowledge of Microsoft Office products.• Ability to operate basic office equipment i.e. calculator, typewriter, photocopier.

IDEAL CERTIFICATES, LICENSES, REGISTRATIONS
NONE

IDEAL KNOWLEDGE/SKILLS
Must be able to communicate (verbally and in writing) clearly in the English Language. Must demonstrate critical thinking, analytical, detail-oriented and organized. Must be an effective and efficient team player with good interpersonal skills.

CUSTOMER/MEMBER INTERFACE
Daily and direct face-to-face contact with members and non-members; may be followed up with correspondence, telephone, electronic messaging, etc.

PHYSICAL DEMANDS
Work Environment: <ul style="list-style-type: none">• "Moderate" noise level in an enclosed air-conditioned facility (e.g., office with computers, printers, work area with light traffic, telephones, etc.).• Usually, indoor work with occasional work outdoors.• Must be able to lift, push, and pull a minimum of 25 lbs.• Position may require prolonged sitting, standing, and walking.

TRAVEL REQUIREMENTS

Travel may be required to attend meeting/educational offerings by car or aircraft to various locations throughout the United States. The length of the travel varies by purpose.

Must be able to regularly travel between the credit union's offices in order to ensure effective operations, and to attend required meetings and training sessions.

ATTENDANCE REQUIREMENTS

Please note that scheduled attendance requirements may change due to business needs.

- Full time schedule is 40 hours per week.
- Scheduled days of work may vary depending on branch location, which may include Saturday hours.
- Must be able to work additional hours, weekends, and Holidays as needed.

KAUA'I FEDERAL CREDIT UNION

I acknowledge that I have read the job description associated with the position that I now hold. I understand that revisions to this job description may occur. I further understand that I may be assigned projects or duties, as needed that may not be specifically listed in the written job description.

I further understand that if I cannot perform the necessary functions of this job, with or without reasonable accommodations, that I may be dismissed from this position and/or the company.

I understand that I have entered into my employment relationship with the company voluntarily and acknowledge that there is no guarantee of a specific length of employment. I acknowledge that this job description is not a contract, or a legal document. Accordingly, either the company or I may terminate the relationship at will with or without cause, at any time, so long as there is no violation of applicable federal or state law.

Kaua'i FCU
Member Services Representative

Job Title: Member Services Representative	Effective Date: May 2022
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Employee Signature

Date