

Primary Objectives:

Provides service to our membership via incoming phone calls. Complete loan applications from members over the phone, as needed. Completes defined tasks within the Sales/Service group to support the membership and other areas of the credit union. Serves as backup branch staff person, as needed.

Reports to: A.V.P. of Member Experience

Primary Responsibilities:

1. Work as a team member with other Member Service Advisors to answer incoming telephones promptly and courteously and direct calls to other resources, as appropriate.
2. Complete in-person, online and telephone loan requests from members and coordinate decision and member communication with underwriting.
3. Provide in-person, online and telephone support for new memberships and account maintenance.
4. Follow credit union policies and procedures relating to loan applications and deposit products.
5. Assess member needs and recommend appropriate loan and deposit products.
6. Make proactive outbound sales calls to solicit new business opportunities.
7. Respond and fulfill member requests made through our website, including account maintenance and other member needs.
8. Fill in, as needed, in the branch office.
9. Other duties as assigned.

Required Knowledge and Abilities:

1. High School Diploma or equivalent
2. Previous experience in a financial institution or similar sales experience.
3. Good interpersonal communication skills
4. Excellent attitude and member service skills
5. Able to perform well in a multi-task environment