



<b>Job Title:</b>	<b>Accounts Specialist</b>
<b>Department:</b>	<b>Member Service</b>
<b>Reports to (Title):</b>	<b>Director of Branch Services or Branch Manager</b>
<b>FLSA:</b>	<b>Non-Exempt – Full Time</b>

**PURPOSE OF JOB:**

Provides prompt, accurate, efficient, and courteous service to members while opening accounts, processing transactions and answering questions.

**ESSENTIAL RESPONSIBILITIES:**

- Assists members with opening new accounts. Explain and expedite the opening, closing, or contributing to IRA certificates.
- Assists members in person or over the phone to post deposits, withdrawals, and/or loan payments and provides members with proper receipts, requested printouts or copies of checks. Assists members in opening suffixes and closing accounts.
- Gathers required information from the members and provides members with account status, including balances, interest rates, previous transactions, checking account questions, and assists members with entering safe deposit box, etc. Explains and educates members on services available. Actively and professionally cross sells credit union products and services. Directs members to other departments if necessary and follows up to be assured the members needs have been addressed quickly and efficiently.
- Assists MSR's with questions, verifying large deposit checks, and support the MSR line. Responsible for filling cash requests from MSR's and TCR's.
- Balances a cash drawer and TCR at the end of each day and keeps the proper cash level according to policies. Completes the End of Day balance sheet properly and clearly, provides this information to accounting.
- Maintains regular contact with other departments to obtain and convey information and/or to correct transactions.
- Completes special projects as assigned.
- Promote and maintain a confidential environment to protect member, employee, and credit union information
- Create and promote a positive professional image of one's self and the credit union
- Exemplify the credit union's People Caring More core purpose and core values

- Pursues continued educational opportunities such as webinars, seminars, conferences, chapter meetings, online training, additional certifications and reviews credit union publications and financial publications.
- Must comply with all company policies and procedures, applicable laws and regulations, including but not limited to, the Bank Secrecy Act, the Patriot Act, and the Office of Foreign Assets Control.
- Perform all other duties as assigned

#### **EDUCATION/EXPERIENCE:**

- High School Diploma; preferred one-year related experience and/or training; or equivalent combination of education and experience.

#### **CERTIFICATES, LICENSES, REGISTRATIONS:** None

#### **SKILLS, ABILITIES, AND OTHER REQUIREMENTS:**

- Ability to communicate, written and verbal effectively and in an easy-to-understand manner
- Ability to perform responsibilities with composure under the stress of deadlines, accuracy, quality and/or fast pace.
- Ability to deal calmly and professionally with numerous different personalities
- Ability to be bonded required
- Ability to successfully organize, prioritize, and manage multiple responsibilities
- Ability to research and comprehend industry trends
- Ability to perform repetitive tasks
- Ability to sit/stand for long periods of time (6-8 hours per day)
- Lifting (up to 50lbs) and the ability to reach and/or stoop/bend required
- Vision abilities include close vision, distance vision, and peripheral vision
- Team player with a positive attitude and flexibility
- Must be capable of regular, reliable and timely attendance.
- Professional demeanor and personal accountability
- Must be capable of exercising highest level of discretion on both internal and external confidential matters.

*The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.*