

NEW BEDFORD CREDIT UNION

Retail Services Representative

JOB TITLE/DEPARTMENT

Retail Services Representative/Retail Services

CLASSIFICATION

Non-exempt

Part-time, non-exempt (18-20 hours weekly)

Full-time, non-exempt (36-40 hours weekly)

AUTHORITY AND REPORTING RELATIONSHIP

The Retail Services Representative position reports to the Head Retail Services Representative.

AMOUNT OF INDEPENDENT ACTION OF THE POSITION

Approval required when solution is not within normal policies and procedures.

SUMMARY/OBJECTIVE

Provide basic cash receipt and payment services in accordance with credit union procedures. Provide services in a timely, accurate and courteous manner to Credit Union members. Cross-sells additional credit union products/services. Respond to members' requests, problems and complaints, and/or directs them to the proper person for resolution.

ESSENTIAL FUNCTIONS

- Maintain Retail Services Representative drawer with adequate cash supplies – and according to policy guidelines.
- Settle Retail Services Representative drawer daily.
- Answer the telephone.
- File new and/or closed signature cards.
- Verify validity of checks and cash received.
- Place appropriate holds on all checks in accordance with applicable policies and regulations.
- Process money orders.
- Process cash advances.
- Promote good member relations by providing premium member service.
- Process mail payments.
- Assess members' individual credit union needs, and use NBCU product knowledge to address those needs by way of cross-selling credit union services.
- Adhere to all security procedures as well as other departmental policies and procedures.
- Compliance with Bank Secrecy Act, OFAC and USA PATRIOT Act including accurate completion of CTR, Monetary Instrument log, and reporting of suspicious activities to supervisor.

QUALIFICATIONS

- High school graduate or GED.
- Minimum of two (2) years cash-handling experience is required.
- Minimum of two (2) years of customer service experience is required..
- Prior experience working in banking or finance is preferred, but not required.
- Prior Retail Services Representative experience is preferred, but not required.
- Basic skills related to Microsoft Office applications.
- Mathematical aptitude.

COMPETENCIES

- Positive, professional business relationships within the credit union.
- The ability to work independently and take-on additional projects as assigned.
- The ability to meet deadlines.
- Strong organizational skills.
- Excellent oral and written communication skills.
- A strong commitment to achieving personal growth and success.

WORK ENVIRONMENT

This job operates in a professional office environment. This role routinely uses standard office equipment such as computers, phones, photocopiers, filing cabinets and fax machines.

PHYSICAL DEMANDS

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. While performing the duties of this job, the employee is regularly required to type, file or lift office supplies up to 20 pounds. The employee is frequently required to sit, stand for an extended period, walk, bend, talk, hear, use hands to finger, handle or feel; and reach with hands and arms.

OTHER DUTIES

Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities and activities may change at any time with or without notice.

New Bedford Credit Union is an equal opportunity employer and does not discriminate against otherwise qualified applicants on the basis of age, race, color, disability or handicap, gender, sex, sexual orientation, religion or creed, ancestry or national origin, military or veteran status, marital status, gender identity of expression, genetic information, pregnancy and pregnancy-related conditions, or any other characteristic protected by law.

It is the policy of NBCU to provide reasonable accommodation for qualified employees with disabilities. If you need accommodation to perform the essential functions of your position, please contact Human Resources directly. Full-time employees are offered a competitive salary commensurate with experience and a comprehensive benefits package including health, dental, short & long term disability, term life insurance, AD&D insurance, 401 (k) plan, and tuition assistance.

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**Applications/resumes may be submitted via e-mail (not secure),
fax, postal mail, or dropped-off in person.**

ATTN: Human Resources
New Bedford Credit Union
1150 Purchase Street
New Bedford, MA 02740

E: joliveira@newbedfordcu.com

T: 508-994-6546 Ext. 103

F: 508-990-7472