

**Signature Federal Credit Union**  
**Structured Compensation - Job Description**  
**Member Services Representative**

Data Year: 2022

Prepared On: 09/14/2022

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Department:	Member Services	Grade:	6
Reports To:	Manager of Member Service	Classification:	Non-Exempt
Supervises Direct:	0	Supervises Indirect:	0
Approved By:	Director of Member Services	Effective Date:	01/01/2010
		Revised Date:	09/08/2021

**Role:**

The Member Services Representative is responsible for assisting members, potential members and other employees with their questions and requests. He/she needs to understand and be able to explain basic IRA, Share, Loan, Mortgage and Visa related products and services, responds to problems, processes member's requests received via web, e-mail, fax, online/mobile banking, or mail and processes death claims, POA, and trust accounts.

**Essential Functions & Responsibilities:**

- E 75% Answers Member Services queue calls and assists members with Share, Loan, Mortgage and Visa related products and services and basic IRA questions, including but not limited to chapter accounts' inquiries, open/close of Certificate of Deposits, account/share closure requests, process transfer/ACH/wire requests, check orders, check disbursement, answers basic loan/mortgage/Visa questions, processes Visa card capture/reissues requests, travel notes, basic fraud/dispute questions, Apple Pay/Google Pay Token requests, Stop Payments, and ACH dispute process information. May handle cash transactions. Completes daily work folder requests. Scans account related documents. Assures that appropriate records are maintained.
- E 15% Processes death claims, power of attorney (POS) trust accounts, account update forms, verification of deposits, certificate disclosures, change of address/contact, Skip-A-Pay/Extension requests, returned mail and other requests via web, e-mail, fax, online/mobile banking, and mail.
- E 5% Backs up front desk; backs up the Poster when needed.
- N 5% Performs other related duties as assigned.

**Performance Measurements:**

1. To provide friendly, prompt, accurate and high quality service and support to all members and associates.
2. To carry out assigned responsibilities according to established department standards.
3. To proactively seek opportunities to cross sell products and services for the betterment of our members.
4. To process member transactions with 99.5% accuracy.
5. To ensure member's request get updated and scanned into the system on a daily basis.
6. To ensure cash drawer and checks are balance on a daily basis if applicable.
7. To maintain all assigned files, so they are current with all filing to be completed daily.
8. To complete other assigned projects in a timely manner.

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9. To maintain a dependable record of attendance and timeliness.
10. To comply with Credit Union's security policy and other policy and procedure if applicable.

**Knowledge and Skills:**

Experience	One year to three years of similar or related experience.
Education	A high school education or GED.
Interpersonal Skills	Courtesy, tact, and diplomacy are essential elements of the job. Work involves personal contact with others inside and/or outside the organization, generally regarding routine matters for purposes of giving or obtaining information which may require some discussion.
Other Skills	General computer operations, MS Word, Excel, and Outlook. Good diction and the ability to communicate effectively verbal and in writing. Must be detail oriented and good with numbers. Able to operate a 10-key calculator. Able to multi-task.
Physical Requirements	This position is mostly operates from a desk. Physical activity is generally limited to lifting small boxes or items less than 20 lbs. Must be able to sit for extended periods of time.
Work Environment	Typical office environment.

**Disclaimer:**

Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions in accordance with the American with Disabilities Act.

**This Job Description is not a complete statement of all duties and responsibilities comprising the position.**

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Printed Employee Name

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Date

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Employee Signature